

How to calculate and improve SDR book productivity rate

A lot of well-meaning SDR leaders set their SDRs up to fail. And it's usually not because of enablement, contact data, or sales engagement tools.

It's also not because reps aren't putting in the work. Most reps work hard to do the right thing.

It often comes down to a misguided idea about measuring the ratio of activity to meeting sets, when what we're really doing is turning accounts into meetings. When we talk about rep productivity, we need to think about both how much they can (and need to) do in a given day or week, as well as the accounts they're working on.

Do you know what your reps' book productivity rate should be? If it's too high, you're missing out on deals because your reps are likely spending time on the wrong accounts. A high book productivity rate means that, every month, the reps' accounts need to be both [high fit and high timing](#) or they'll struggle.

What is book productivity?

First, let's talk about book productivity and how you measure it. We think of the "book productivity rate" as the percent of accounts an SDR needs to turn into meetings to hit their quota. For example, if SDR is expected to set 10 meetings a month, and they work 100 accounts each month, they would need a 10% productivity rate to hit quota.

When you pair this book productivity rate with an activity-based capacity model, you can get a clearer view of what you're actually asking your reps to do to succeed. If they're doing the right things and still not getting close to their number, then maybe it has to do with the accounts they're working.

The book productivity rate helps you think about whether or not your reps have the quantity and type of accounts they need to succeed at the rate you're asking them to perform.

Calculating your book productivity rate

We've created a free worksheet you can download to use for [your own calculations here](#). Let's work through an example together.

You'll need 4 numbers to start:

- **Touches per day:** The total number of activities (emails, calls, etc) a rep is expected to do per day
- **Touches per contact:** The total number of times you expect an SDR to reach out to a contact
- **Contacts per account:** The average number of contacts on an account you expect a rep to reach out to
- **Monthly quota:** The number of meetings/opps/demos you expect a rep to book each month

In addition, if your SDRs have a territory or book of accounts, you can optionally use **territory or book size** (the number of accounts in a rep's name at any time).

So for our example, let's say you expect an SDR to do 100 activities a day, and touch each contact 10 times before an account is worked to completion. Your ICP is SMBs, so you generally only have 1 contact per account. And to be on quota, a rep has to set 10 meetings per month.

Inputs	Value	Analysis	
Touches / Day	100	Accounts Covered / Month	200
<small>The total number of activities (emails, calls, LinkedIn, etc) you're asked to do each day</small>		<small>The total number of accounts you can cover in a month at the required activity level and depth (factoring in touches/account and contacts sequenced per account)</small>	
Touches / Contact	10	Required Productivity Rate	5.0%
<small>The number of times you're supposed email/call a contact on an account before you consider them fully "worked".</small>		<small>The percentage of accounts worked that need to be converted to demo set / meeting / opportunity for you to hit quota.</small>	
Contacts / Account	1	Attainment Difficulty	Normal
<small>The total number of contacts you're supposed to touch before an account is considered "worked".</small>		<small>Attainment difficulty is based on the book productivity rate required to hit quota. A relatively high productivity rate means you have to be very good at turning accounts into opportunities. If your attainment difficulty is Hard or Very Hard, your quota may be difficult to achieve without working more accounts or having very high quality accounts.</small>	
Quota / Month	10		
<small>The amount demos/meetings/opps you're expected to source every month</small>			

That means a rep can cover 200 accounts a month, and would need to convert 5% of those to be on quota. That's the rep productivity rate, and one that shouldn't be too difficult to achieve if the rep is working the right accounts and putting in the work. In fact, even if the rep isn't working very qualified accounts, they're bound to convert 5% of them by just working harder.

But what happens when we tweak those numbers just a little? Let's hold everything constant except the contacts per account. Even a small business could have 2 contacts you want to reach out to. And we know multi-threading is important to closing mid-market and enterprise deals. That suddenly makes it harder for a rep to hit quota. They can now only cover 100 accounts per month, and would need to convert 10% of those. That means you should do everything you can to be sure those 100 accounts are high potential.

Inputs	Value	Analysis
Touches / Day <i>The total number of activities (emails, calls, LinkedIn, etc) you're asked to do each day</i>	100	Accounts Covered / Month 100 <i>The total number of accounts you can cover in a month at the required activity level and depth (factoring in touches/account and contacts sequenced per account)</i>
Touches / Contact <i>The number of times you're supposed email/call a contact on an account before you consider them fully "worked".</i>	10	Required Productivity Rate 10.0% <i>The percentage of accounts worked that need to be converted to demo set / meeting / opportunity for you to hit quota.</i>
Contacts / Account <i>The total number of contacts you're supposed to touch before an account is considered "worked".</i>	2	Attainment Difficulty Very Hard <i>Attainment difficulty is based on the book productivity rate required to hit quota. A relatively high productivity rate means you have to be very good at turning accounts into opportunities. If your attainment difficulty is Hard or Very Hard, your quota may be difficult to achieve without working more accounts or having very high quality accounts.</i>
Quota / Month <i>The amount demos/meetings/opps you're expected to source every month</i>	10	

And to add another wrinkle, we know that the average B2B SDR quota is more than 10 meetings a month - it's typically more like 15-20. At 1 contact per account, the rep productivity rate is 7.5%, which is starting to become difficult. And with 2 contacts per account, it's 15%, and that's very hard. You definitely want to be sure they're working highly qualified accounts if they need to convert 15% of them.

So as you're thinking about the activity you expect from reps, this calculation can help you figure out the ideal rates given your ICP and sales cycle. And do your reps have the accounts they need to be successful in your model?

Access the [productivity worksheet here](#) (this is the Productivity Rate tab).