Business Proposal for Sugarwork

Building a Scalable SDR Growth Engine

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Proposal Overview

Sugarwork has an opportunity to build its first dedicated sales development function from the ground up. The goal is to create a repeatable revenue-development engine with clear ownership, reliable data, documented processes, trained representatives, measurable activity standards, and strong alignment across Marketing and Sales.

This proposal presents two paths. Option 1 appoints Sharon Rojas as Fractional Director of Revenue & Business Development for the SDR function, building an internal department and supporting both outbound and website-intent inbound motions. Option 2 launches a fully managed, outbound-only three-month pilot in partnership with Chili Marketing, including the prospecting stack, execution, and a defined held-meeting commitment.

Challenges and Goals

Current Challenge	Goal and Objective
No SDR team or established leadership structure	Build a complete SDR function under director-level leadership, with accountability, coaching, and repeatable workflows.
No consistent inbound lead source	Create an inbound motion using website-visitor intent and coordinate with Marketing to develop additional lead sources.
No outbound prospecting engine	Launch a structured outbound motion supported by accurate targeting, multichannel sequences, and high-volume calling.
No SDR onboarding, SOPs, or formal training	Develop an onboarding and enablement system that shortens ramp time and makes future hiring scalable.
No defined SDR reporting or performance standards	Implement activity, conversion, meeting-quality, pipeline, and coaching metrics for leadership visibility.

Recommended Build Roadmap

The roadmap below applies to the department build. Under Option 2, the same discovery principles are compressed into an outbound-only pilot operated through Chili Marketing.

Phase	Primary Deliverables	Timing
1. Foundation	Customer and market analysis; ICP and persona definition; buying triggers; US-first territory strategy; tech-stack setup; KPI framework; hiring profile; SDR expectations.	Weeks 1-2
2. Build	Outbound sequences; call scripts; objection handling; lead-routing rules; CRM stages; reporting dashboards; inbound website-visitor workflow.	Weeks 2-4
3. Launch	SDR onboarding; live training; call coaching; campaign launch; daily operating cadence; quality assurance.	Month 2
4. Optimize and Scale	Weekly performance reviews; conversion analysis; message testing; coordination with Marketing; additional hiring as pipeline grows.	Month 3 onward

Core Department Deliverables

• SDR department structure, roles, responsibilities, and operating cadence

• Hiring profile, interview scorecard, onboarding plan, and ramp expectations

• Documented SOPs, playbooks, call scripts, sequences, and objection handling

• Outbound prospecting engine using Clay, Apollo, Sales Navigator, and Trellus

• Inbound workflow for website visitors plus Marketing alignment on new lead sources

• Weekly coaching, enablement, performance management, and CEO-level reporting

• A scalable hiring and capacity plan as lead volume and pipeline increase

• Optional territory expansion into Europe and LATAM after US messaging and conversion benchmarks are validated

Option 1

Fractional Director of Revenue & Business Development

Sharon Rojas serves as Sugarwork's contracted Fractional Director of Revenue & Business Development for the SDR function. Sugarwork directly owns and pays for its software subscriptions and SDR headcount, while Sharon leads the revenue-development strategy, data strategy, department design, implementation, onboarding, training, enablement, performance management, Marketing alignment, lead handoffs, and pipeline governance.

The core authority remains focused on SDRs. Sharon will also provide director-level support for adjacent revenue needs—including CRM configuration guidance in HubSpot or Salesforce, website-visitor inbound workflows, reporting, and Sales/Marketing coordination—as required to make the SDR motion successful.

This option gives Sugarwork direct ownership of its people, systems, data, and long-term operating model. The department can add SDR capacity progressively as results and pipeline justify expansion. The proposed structure is a 12-month contractor agreement billed monthly, with final termination and renewal provisions defined in the service agreement.

Monthly Investment

Item	Paid To	Monthly Cost
Fractional director leadership, department build, revenue and data strategy, onboarding, SOPs, training, enablement, and SDR management	Sharon Rojas	**$3,000**
Clay.com - Growth Plan	Software provider	$446
Apollo	Software provider	$99
LinkedIn Sales Navigator	Software provider	$119
Trellus	Software provider	$119
One SDR - maximum activity target up to 250 call attempts per day	SDR contractor	$1,800
Estimated total monthly investment		**$5,583**

The $1,800 SDR compensation is fixed; any commission or performance incentive will be agreed separately. Software pricing is based on the figures provided and may change according to vendor pricing, taxes, usage, seats, or plan changes. Sugarwork would contract directly with the software providers and SDR.

Option 2

Fully Managed SDR Pilot

Sugarwork launches a complete outbound SDR system through a three-month pilot directed by Sharon Rojas in partnership with Chili Marketing. The monthly fee covers the core prospecting tools, data sourcing and enrichment, SDR execution, campaign operations, management, and monthly reporting.

Sharon serves as Fractional Director of Revenue & Business Development for the outbound SDR motion and owns the operating relationship with Chili Marketing. This gives Sugarwork one accountable point of contact while reducing the operational work and up-front complexity of separately hiring an SDR and assembling the technology stack.

This option is intentionally limited to outbound. Website-visitor inbound, broader Marketing programs, CRM redesign, and other revenue projects are not included unless added in writing.

Included

• Director-level SDR management and Chili Marketing relationship management

• Core outbound prospecting technology required for the pilot

• ICP, targeting, data enrichment, campaign setup, and list operations

• Outbound sequences, call execution, coaching, and quality control

• Qualified prospects and activity information recorded in Sugarwork’s CRM

• Monthly performance reporting, pipeline feedback, and campaign optimization

• Six qualified held meetings in Month 1, followed by eight qualified held meetings in each subsequent pilot month, subject to the qualification and operating terms below

Commercial Terms	Investment
Fully Managed SDR Pilot	**$6,500 per month**
Initial pilot term	3 months
Initial contract value	**$19,500**
Qualified held-meeting commitment	**Month 1: 6 | Months 2-3: 8/month**

Best fit: Sugarwork wants to validate the SDR motion quickly, centralize vendor and execution management, and test predictable meeting generation before building a larger internal department.

Option Comparison

	Option 1: Internal Build	Option 2: Managed Pilot
Monthly investment	Approx. $5,583	$6,500
Initial term	12-month agreement, billed monthly	3-month pilot
Tools	Purchased directly by Sugarwork	Core tools included
SDR	Contracted directly by Sugarwork	Execution included
Management	Sharon Rojas	Sharon Rojas, managing Chili Marketing
Motions included	Outbound plus website-visitor inbound	Outbound only
Meeting commitment	No fixed guarantee; optimized against agreed KPIs	6 held meetings in Month 1; 8/month thereafter
Best for	Long-term internal ownership	Faster validation with lower operational burden

Recommendation

For a company creating its first SDR function, the fully managed three-month pilot offers the clearest path to validate messaging, channels, meeting quality, and conversion assumptions before making a longer-term internal investment. If Sugarwork already prefers direct ownership of the team and systems, Option 1 provides a lower estimated monthly cost and creates a permanent internal capability.

Operating Terms and Assumptions

To protect both parties and make the pilot measurable, the final agreement should confirm the following definitions and responsibilities:

Qualified meeting

A meeting with a prospect who matches the mutually approved ICP and role criteria, attends the meeting, and has agreed to discuss a relevant operational-knowledge, process-mapping, AI-readiness, automation, workforce-transition, or related business need. Final industries, company sizes, titles, exclusions, and qualification questions will be approved during ICP development.

Pilot ramp period

The first 10 business days may be used for onboarding, access, ICP approval, data preparation, messaging, domains, and campaign launch. The meeting commitment begins once campaigns are live and required access and approvals have been provided.

Meeting replacement

A no-show, duplicate, clearly out-of-ICP meeting, or meeting canceled before attendance does not count toward the commitment and will be replaced during the active contract term.

Client responsibilities

Sugarwork will provide timely access to required systems, product and pricing information, brand and messaging guidance, prospect exclusions, calendar availability, and feedback on meeting quality.

Sales follow-up

Sugarwork remains responsible for timely attendance, discovery, opportunity management, proposals, and closing unless separately included in writing.

Scope changes

Additional SDRs, markets, languages, data volume, specialized software, paid advertising, travel, or work outside the agreed scope may require a revised fee.

Reporting

Option 1 includes performance reporting designed as needed with leadership. Option 2 includes a monthly outbound performance report. Reporting cadence and required CRM fields will be finalized at kickoff.

Billing

Fees are invoiced monthly in advance. Vendor prices and taxes may change. Final payment terms, cancellation rights, confidentiality, data ownership, meeting-remedy terms, and renewal provisions will be documented in the service agreement.

Preliminary Market Hypotheses

Research indicates that Sugarwork helps organizations capture tacit operational knowledge and convert it into process documentation and clearer AI and automation investment decisions. Initial US targeting hypotheses include mid-market and enterprise organizations undergoing AI transformation, restructuring, succession planning, rapid scaling, or complex cross-functional process improvement. Likely personas include COO and Operations leaders, Transformation and Automation leaders, CIO/CTO organizations, Knowledge Management, HR/People leadership, and business-unit executives. These are hypotheses to validate—not a substitute for the customer, win/loss, and ICP analysis included in the engagement.

Proposed Next Step

Select the preferred option, confirm the initial US market, complete the customer and ICP analysis, agree on the qualified-meeting definition, and schedule a kickoff session to finalize access, implementation dates, and the first 30-day launch plan. Europe and LATAM can be evaluated as expansion territories after the initial motion is validated.

Prepared for executive review. Final scope and commercial terms are subject to mutual approval and a signed service agreement.