

ALPHABRIDGE CONSULTING

BD TEAM PROCESS & PERFORMANCE HANDBOOK

Process Building | Growth Ladder | Lead Quality | Follow-ups | Rewards | Accountability

OWNERSHIP Clear role expectations and escalation paths	DISCIPLINE Documented follow-ups, reporting and calendar hygiene	RESULTS Qualified leads, projects and payment-confirmed outcomes
GROWTH Transparent promotion ladder from Associate to Director	QUALITY Lead validation, tailoring and duplicate-application controls	RECOGNITION Monthly and quarterly performance rewards

Purpose

Create one operating standard for the BD team: how we work, how we qualify leads, how we coordinate with Closers and Developers, how performance is measured, and how people grow.

Prepared for internal team use

. How to Use This Handbook

Operating Principle

Use this handbook as the default operating standard. Where a client requirement, approved company policy, or direct management instruction differs, follow the approved instruction and document the exception.

1	Operating Principles & KPIs
2	Growth Ladder & Promotion Criteria
3	Roles, Ownership & Coordination
4	Lead Generation, Follow-up & Documentation
5	Tailoring & Duplicate-Application Checkpoints
6	Valid vs. Invalid Lead Rules
7	Calendar Comment Policy
8	Reference Checks & Recruiter Coordination
9	Project Onboarding & Lead Multiplication
10	Support & Escalation Contacts
11	Professional Standards & Performance Reviews
12	Performance-Based Reward System
13	Daily / Weekly / Monthly Operating Rhythm
14	Quick Checklists

1. Operating Principles & KPIs

A measurable system built around quality, consistency, ownership and results.

Ownership Own the lead from discovery through documented handoff and follow-up.	Quality over noise Only qualified, relevant leads count; fake, duplicate, incomplete or low-quality leads do not.	Transparent coordination Keep Closers, Developers and leadership accurately informed. Never hold back material information.
Documentation first	Professional communication	Initiative

If it is not properly recorded in the agreed tracker/calendar/channel, it should be treated as incomplete.	Keep official work in official groups/channels. Avoid unrelated chit-chat in work threads.	Be inquisitive. Research first, attempt a solution, then ask focused questions - never bring half-cooked information.
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Core KPI Framework

KPI	What Good Looks Like
Qualified Leads	Valid leads that meet team criteria and are accurately documented.
Payment-Confirmed Projects	Projects count after payment confirmation; offer letters alone do not count for project awards.
Follow-up Discipline	Timely follow-ups across warm, ghosted and no-response leads, with the status recorded.
Lead Quality	Relevance, pay suitability, role/workplace fit, duplication checks and call outcome quality.
Documentation Accuracy	Complete tracker data, calendar comments, status updates and handoff notes.
Conversion Quality	Movement from first contact/call to next round, especially for RTR and AI call cases.
Professional Coordination	Clear, respectful communication with Closers, Developers and internal support teams.
Ownership & Improvement	Initiative, problem solving, learning speed and month-over-month improvement.

Commission & Earnings

Commission percentages must follow the approved company/team policy. Do not promise or communicate an unapproved rate. The earning scenarios below are an internal roadmap illustration, not a guaranteed payout.

Illustrative Roadmap to ~\$500/month

- 3 contract projects -> approximately \$500
- 2 contract projects + 1 W2 project -> approximately \$500
- 7 W2 projects -> approximately \$500

2. Growth Ladder & Promotion Criteria

Growth is tied to demonstrated project outcomes, leadership readiness and sustained operating discipline.

Level	Role	Project Milestone	Next Step
1	Associate Growth	3 personal projects	Promoted to Squad Lead

Level	Role	Project Milestone	Next Step
Executive			
2	Squad Lead	3 personal projects + 3 team projects	Promoted to ATL
3	ATL	3 personal projects + 6 team projects	Promoted to TL
4	TL	25 projects overall	Promoted to Associate Manager
5	Associate Manager	28 projects	Promoted to Manager
6	Manager	Leadership scope and criteria set by management	Progression to Sr. Manager
7	Sr. Manager	Leadership scope and criteria set by management	Progression to Director
8	Director	Senior leadership level	-

Promotion Governance

Project thresholds are necessary milestones, not a substitute for professionalism. Promotions should also consider lead quality, documentation, discipline, teamwork, ownership and readiness for the next role. Manager/Sr. Manager progression criteria should be formally defined by leadership before evaluation.

Traits to Develop at Every Level

- Responsibility and reliability
- Smart-minded problem solving
- Eagerness to help others
- Attention to detail
- Eagerness to attempt and research before asking
- Professional communication and respect
- Ability to coach, document and multiply successful practices

3. Roles, Ownership & Coordination

Indicative workflow ownership: BD 40% / Closer 60%, unless leadership assigns otherwise.

Role	Primary Responsibilities
BD	Job applications; lead generation; recurring follow-ups; accurate documentation; transparent coordination; calendar comments; duplicate checks; qualified handoff.
Closer	Lead progression, recruiter/client engagement, conversion

activity, follow-through after handoff, and coordinated feedback to BD.

ATL / TL

Quality control, coaching, conflict resolution, performance review, project coordination and escalation.

Developer / Candidate

Timely availability, accurate technical/profile information, interview preparedness and transparent status updates.

Bilal - IT

Laptop, hardware and technical equipment issues.

Sanaullah - Procurement

Mouse, charger, cable, peripherals and procurement/support requests.

Official Communication Rule

All official work must be shared with the concerned people through official groups/channels. Keep work threads focused; avoid unrelated chit-chat. Important decisions, changes and blockers should be documented rather than left in private conversations.

4. Lead Generation, Follow-up & Documentation

A lead is only useful when the team can understand its status, history, owner and next action.

Follow-up discipline

- Maintain recurring follow-ups as a normal operating habit.
- Segment follow-ups: warm leads, warm-but-ghosted leads, and no-response leads.
- Every follow-up should have a next action, owner and status.
- Avoid rescheduling the first call unless genuinely necessary. If unavoidable, communicate promptly and record the reason.
- Escalate blockers early rather than allowing a lead to silently expire.

Minimum documentation for every active lead

- Company and role
- Workplace type (remote/hybrid/onsite)
- Rate/pay information when available
- Recruiter/client contact
- Current stage / call round
- Last interaction date
- Next follow-up date
- Outcome notes / calendar comments
- BD owner and Closer owner
- Any technical issue, missed call, RTR/AI status or special circumstance

5. Tailoring & Duplicate-Application Checkpoints

Use tailoring where it materially improves fit, and prevent duplicate/conflicting applications.

When Tailoring Is Mandatory

Contract roles should be tailored. W2 roles with strong pay and relatively low applicant volume (e.g., fewer than ~30 applicants) should receive focused tailoring.

Before applying to the same company / same job family, check:

1. Candidate/profile identity being used
2. Original profile record
3. Email address
4. Home/location information
5. Phone number
6. Resume content and template
7. Email outreach template
8. All relevant browser/Chrome profiles - active and inactive - to check whether the job or another role at the same company was previously applied to

Compliance Guardrail

Candidate identity and application information must be accurate, authorized and consistent with the approved candidate profile. These checkpoints are for preventing duplicate/conflicting applications and protecting candidate credibility - not for misrepresentation.

6. Valid vs. Invalid Lead Rules

Apply the documented BD and Closer lead-validation criteria consistently.

BD Lead Validation Criteria

Status	Criteria
VALID	Remote / Hybrid
VALID	Developer missed the call
VALID	Technical issues
VALID	RTR - only when converted to 2nd round
VALID	AI - only when converted to 2nd round
INVALID	RTR - when not converted to 2nd round
INVALID	AI - when not converted to 2nd round
INVALID	Onsite
INVALID	Very low pay rate calls

Closer Lead Validation Criteria

Status	Criteria
VALID	Remote / Hybrid
VALID	RTR - only when converted to 2nd round
VALID	AI - only when converted to 2nd round
INVALID	RTR - when not converted to 2nd round
INVALID	AI - when not converted to 2nd round
INVALID	Onsite
INVALID	Very low pay rate

Important

RTR and AI calls are valid only when they convert to a second round. Fake, duplicate, incomplete, irrelevant or low-quality leads must not be counted toward performance or rewards.

7. Calendar Comment Policy

Calendar comments are part of lead quality and accountability.

Role	Comment Requirement	If Missing
BD	Mandatory	Lead will NOT be added or considered.
Closer	Mandatory	Lead WILL still be considered and added.

- Do not write only “VALID” or “INVALID” in calendar comments.
- Comments should contain appropriate, relevant lead details and context.
- Add comments accurately and on time.
- The BD and Closer remain responsible for the quality of their own notes.

8. Reference Checks & Recruiter Coordination

Use reference-check conversations carefully, transparently and only with confirmed information.

- Understand how the reference-check process will be used before presenting it as a solution.
- Verify the company’s actual compliance/reference requirements before discussing them with a recruiter.
- Share only confirmed, accurate information - never invent compliance details or present assumptions as facts.
- Coordinate transparently with the respective Developer/Candidate and Closer.
- Document recruiter feedback, blockers and next steps.

BD Mindset

A BD should be inquisitive: investigate, verify and understand the situation before escalating. Avoid half-cooked information, shortcuts or untested techniques.

9. Project Onboarding & Lead Multiplication

Winning a project is not the end of the BD responsibility; clean onboarding protects delivery and future opportunity.

- Coordinate properly during project onboarding with the responsible lead/manager and concerned team members.
- Ensure the Closer and Developer/Candidate have the same understanding of start date, client expectations, communication path and any pending documentation.
- Discuss lead multiplication: one strong relationship or successful engagement can create additional roles, referrals or follow-on opportunities.
- Use internal success examples such as Sovos and Blue Acorn when training the team on lead multiplication, without assuming the same path will apply to every client.
- Capture lessons learned after a successful project so the approach can be repeated by the wider team.

10. Support & Escalation Contacts

Use the right internal support path instead of allowing operational issues to delay sales activity.

Contact	Use For	Email
Bilal - IT	Laptop or hardware issues; IT troubleshooting; device-related problems.	operations@alphabridgeconsulting.com
Sanaullah - Procurement	Mouse, charger, cable, peripheral or other procurement/equipment needs.	operations@alphabridgeconsulting.com

Escalation Standard

When contacting Operations, include your name, device/item, issue or request, urgency, and any relevant screenshot/model details. Keep one thread per issue where possible.

11. Professional Standards & Performance Reviews

Respect is earned through consistent work, reliability and how you coordinate under pressure.

- Stay professional with Closers, Developers/Candidates and support teams.
- Earn respect through quality work, preparation and follow-through.
- Keep communication factual, transparent and respectful - especially when a lead is blocked or lost.
- Individual performance should be recorded and evaluated at regular intervals.

- Use coaching and performance reviews to identify one or two concrete improvement areas, not vague criticism.
- Be innovative: test better approaches, document what worked, and share repeatable learning with the team.

Suggested Review Cadence

Cadence	Focus	Output
Daily	Lead status, follow-ups, blockers	Clean tracker and next actions
Weekly	Lead quality, pipeline, conversion, documentation	Coaching actions and priority list
Monthly	KPI performance, projects, rewards, improvement	Performance review + recognition + growth plan
Quarterly	Promotion readiness, sustained results, team impact	Growth decision / development plan

12. Performance-Based Reward System

Already in effect from July - a personal appreciation initiative, not a company compensation policy.

Team Message

The purpose is simple: push harder to our limits and break our comfort zone. Sales pressure is high, but performance should be recognized through real effort, consistency, discipline, ownership and actual results.

1. Project Champion Award

PKR 10,000

BD with the highest number of payment-confirmed landed projects in the month. Offer letter alone does not count; payment confirmation is required.

2. Lead Generation Leaderboard

1st: PKR 2,000 | 2nd: PKR 1,000

Only BDs who achieve their own monthly lead KPI are eligible. Only valid qualified leads count; fake, duplicate, incomplete, irrelevant or low-quality leads do not.

3. Most Improved BD Award

PKR 3,000

One BD showing the strongest month-over-month improvement in lead quality, consistency, reporting discipline, follow-ups and ownership.

4. Best Intern Award

PKR 2,000

Best-performing intern based on 25 valid leads, data accuracy, consistency, discipline and support quality.

5. Quarterly Elite Closer Reward

Bigger capped reward

Any BD who brings 9 payment-confirmed projects in 3 consecutive months, or demonstrates exceptional performance of 6 contract projects in 3 consecutive months, can qualify after payment confirmation.

What This Is About

This is not just about money. It is about ownership, comeback, hunger, discipline and a winning mindset - while maintaining quality, integrity and professional standards.

13. Daily / Weekly / Monthly Operating Rhythm

Turn the handbook into a repeatable routine rather than a one-time announcement.

Daily

- Review new jobs/leads and prioritize high-fit opportunities.
- Tailor required applications before submission.
- Complete duplicate-application checkpoints.
- Update lead status, comments and next follow-up date.
- Follow up with warm, ghosted and no-response leads.
- Escalate technical/procurement blockers immediately through the correct support channel.

Weekly

- Review valid vs. invalid leads and remove noise from the pipeline.
- Check follow-up compliance and stale leads.
- Review conversion movement, especially RTR/AI to second round.
- Share one lesson, successful technique or lead-multiplication insight with the team.
- ATL/TL provides targeted coaching and resolves process gaps.

Monthly

- Close KPI reporting and verify reward eligibility.
- Confirm payment-confirmed project counts.
- Recognize Project Champion, Lead Generation leaders, Most Improved BD and Best Intern.
- Conduct individual performance reviews and document growth actions.
- Review promotion milestones against the Growth Ladder.

14. Quick Checklists

Use these as the minimum quality gate before a lead or application is considered complete.

Before Applying

- Role is relevant to candidate/profile
- Workplace type checked
- Pay/rate acceptable
- Tailoring completed where required
- Duplicate/company history checked across relevant profiles
- Identity/contact information is accurate and authorized
- Resume and outreach align to the role without misrepresentation

Before Counting a Lead

- Lead meets BD/Closer validation criteria
- RTR/AI converted to second round if being counted as valid
- Calendar comment added with relevant details
- Lead is not fake, duplicate, incomplete, irrelevant or low-quality
- Owner, stage and next action are documented

Before Handoff to Closer / Developer

- All material details are shared transparently
- No missing recruiter/client context
- Call/interview timing confirmed
- Known technical or scheduling issue documented
- Expected next action and owner are clear

Final Standard

Be responsible. Be curious. Be disciplined. Document the work. Communicate transparently. Protect candidate and company credibility. Focus on qualified opportunities and measurable results.