



Pre-Call Planning

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Discuss how to create a script to maximize your efficiency on the phone.

Pre-call Planning

When you use your telephone to make sales calls, there is one single factor that pays off more than any other: **pre-call planning**.

You must plan your telephone sales call as carefully as you would face-to-face presentations. Most telephone calls fail because of this lack of planning. So many salespeople place the call first and then attempt to handle the situation by ear. This won't work!

Before the end of today, pre-call companies you are planning to call tomorrow. Find out who you should be talking to, get the correct spelling and pronunciation of his/her name, and if you can, get that person's direct number.

This way, when you call the next morning, you may get to talk to the person you are calling directly. If you can't get to talk with the person themselves, craft a distinctive voice mail message that will leave the door open for a return call from your contact, or pave the way for your follow-up call.

Tip: Try the early morning technique. You will be pleasantly surprised at how many decision-makers answer their own phone early in the morning.

Phone Tag and Call Backs

While technology that is available today can make it harder for you to reach the decision maker, it can also offer you some opportunities. Two of the most important tools are call tracking plans and voice mail. One thing everyone should be doing is keeping track of who we have called and how often we have called them.

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Test Your Knowledge

What type of call tracking plan do you have?

What would you consider the right number of callbacks in a week?

In a month?

When we do take advantage of voice mail and leave a message, there are four strategies we can use that help us make our message more effective.

Option One: The Referral

This is the best option when you have the opportunity to use it. However, it must be an honest referral. If you leave a message like the following example, you will usually get a response.

Example: “Hello Mr. Fields, I was talking to Joe Sampson and he suggested I give you a call because I offer _____service and he mentioned that you are looking for this. When you get a chance, please call me at 901-555-2120.”

Option Two: The Third-Party Message

This option is useful if you are working for company ABC and you have delivered excellent results for them. You know that company XYZ is in the same type of business, would know the name of company ABC, and could probably use the same type of services/products. You will want to sound poised, confident, and concise.

Example: “Hello Ms. Jones, I’m calling regarding Company ABC. When you get a chance, could you please call me at 901-555-2120?”

Option Three: The Warm Cold Caller

The script sounds something like this: “Hello Ms._____. This is Freda Whitehouse with ABC Company calling. My number is 901-555-2120, and I can be reached at this number between nine and noon, Monday to Friday. I was told you are the person to speak to about _____, and I’d really appreciate the chance to chat with you about it. My number is 901-555-2120.”

Option Four: The Straight-Ahead Pitch

Use this when no other techniques are available to you. You’ve tried early morning calling, you’ve tried enlisting the help of the receptionist/secretary/assistant, and this is your final attempt of the month to

reach this person. You simply adapt your standard cold calling script, which you have already prepared. It might sound something like this.

Example: “Hi Ms. Jones, this is Freda Whitehouse with ABC Company calling. I’m sorry I missed you today. We just put together an interesting (training package, computer program, Web site, etc.) for XYZ Company so they could spend less time dealing with employee conflict, tracking results, and providing general information to interested customers. I thought something like this might work well for your company too. If you are interested and want to learn more about how we can help, I’d like to get together to talk about it a bit. Would this Friday at 2 p.m. work for you?”

Tips

Whatever response option you choose, prepare your script and practice until you can deliver your message in a professional, confident, and friendly tone of voice, without hesitation.

Before making your first sales call of the day, prepare yourself and your environment for the task.

Don’t be surprised if you get a call back but the caller has not listened to your message. When crunched for time, people will check their call display and make calls, but they might not listen to messages, especially if they are lengthy.

Following Up

After working hard to cover your market, be sure to keep a record of your calls and results. Be sure to plan a callback at a future date to those prospects who indicate an interest, but who can’t meet with you now.

Avoid missed opportunities by doing the following immediately after each call:

- Record any notes and update the contact’s information in your database. You may be able to do this during the call if you use a headset.
- Record the date of your appointment and directions (if required) in your calendar.
- Make sure that you also allow for driving time in your calendar.
- Be prepared to fulfill any commitments made to the contact during your call.

Surprisingly, many sales people do not consciously track tasks and calls that they need to follow up. As a result, they struggle to meet their goals every month. Successful sales people understand the power in working with a warm prospect, and providing prompt and efficient follow up. Don’t lose opportunities because you are not organized.

Use the space below to sketch out a template for your ideal follow-up tracking sheet or form.

Closing the Sale

Asking for the Sale

Does an objection mean no? No, thank goodness! An objection means that your prospect has heard enough to ask some questions or offer thoughts on what you are saying. An objection is actually a better buying indicator than a client who says nothing at all.

Did you know that...

- 63% of sales are made after the fifth touch – and all five of those touches may have been rejections. (Many customers don't buy until after 8 touches; some as many as 12!)
- 75% of salespeople quit after the first rejection.

These numbers explain why 20 percent of the sales force often produces 80 percent of the sales. People who are persistent, have a plan, and want to provide customer focused service have better sales results.

Every day, thousands of sales are made to people who, when first asked to buy, said “no.” You will find a large percent of prospects who will offer objections and if you are prepared, you will be able to answer these objections without hesitation or embarrassment. An objection doesn't need to be considered as the end of an unsuccessful contact, but merely as a roadblock which must be cleared away.

Therefore:

- Do not object to objections; they are a very good sign. They indicate that the prospect is listening and thinking about what you are saying.
- It is only human that we all first think of why we should not be interested and then we start to consider why we should.
- As long as you have your list of anticipated objections with answers prepared before you start the call, you will be ready to handle anything.

Closing the Sale

Remember that you can't make a buyer do anything, including making a decision to buy. Besides, trying to force somebody to do something they don't want to do is not only unethical, but it may work against you in the long run.

Textbooks will give you all sorts of suggestions for closing the sale. However, if you have two or three that you use and use well, this can work in your favor. If you have too many techniques that you think might work, you may come across as unsure and indecisive. Use what works for you. Remember, whether the answer is yes or no, find out why.

If you presently have no strategies at all, try these.

Direct Questions

- Are we ready to move ahead on this?
- When can we get started?
- Shall I write up the order?

The Ben Franklin Approach

Take a sheet of paper, divide it in half, and write up the pros on one side of the sheet. Then you invite the buyer to write up the other side with cons. This close can be effective for the undecided buyer who just needs to get everything in perspective. However, use it with caution. If you get the sense the buyer doesn't want to do this, drop it immediately.

The “Leave It with Them for the Weekend” Close

Whether it's a new puppy, a photocopier, or a TV, leaving the product with the buyer for the weekend is an option that often works. They get to try it out on their own and pretty soon they are coming up with their own reasons why they should buy this.

Persistence Pays Off

While you don't want to become a pest, you also don't want to assume a “no” today is a “no” for a lifetime. Some salespeople will tell you they expect five rejections before they get the green light. While that may or may not be the right number of rejections to expect, do expect rejections. Learn from them. Then use what you've learned when you go back to try again.

You can also use the “no” client as a source of referrals. Although they are not buying from you, they may know someone who can use your product or service and be willing to refer you to them. It can't hurt to ask.

Thank You Notes

Never underestimate the power of the thank you note. If you get the sale, send them a note thanking them for their order. If you don't get the sale, send them a note thanking them for taking time to meet with you.

Polishing the Script

Here are some tips on practicing:

- Find a tape recorder or use the voice recorder on your computer and record yourself in an imaginary call. Record each element of your call and either imagine or impersonate your prospect as well.
- Practice with a partner. Take turns playing the role of the prospective client. Throw each other some curve balls.

- Listen to the tone of your voice as you practice. Make sure you vary the sound of your voice. Nobody wants to listen to a monotone.
- Do you sound confident and professional? If you don't, practice until you do.
- Are you following your script? If you find yourself asking questions you never intended to ask or including more chatter than you planned, go back to more role playing until you feel comfortable with the recommended script format.
- Once you become comfortable with your script, try to practice a few imaginary calls each day before you get down to the serious business of calling, just to get yourself warmed up and in the mood.