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Cold Call Best Practices

Pre-Call Planning

STEP 01

Know the Decision Maker's full name. If you don't know, call into their sales dept a day or two in advance to learn it.

Gatekeepers

STEP 02

Don't ask if the DM is available. Simply ask to be transferred in a professional tone of voice.

Opening Statement

STEP 03

Have your opening statement written down, rehearsed, and ready for action.

Qualifying

STEP 04

Ask key qualifying questions to uncover needs and position yourself as a consultant.

Appointment

STEP 05

Always leave the call with an agreed-upon next step.

Key DO's and DONT's

DO

Use CRM Software to Manage the Sales Process

Salesforce is the industry gold standard, but there are others. Zoho has a free one that anyone can use. The point is to track your calls to keep yourself better organized, recall past conversations with prospects, and avoid calling into a business more than once if they've asked you to remove them from your list.

Create a Call Script and Memorize/Rehearse It

I know, it sounds a little "canned" to go about business this way. Still, you only have about 7 seconds to make a first impression on a call, and you can't afford to be caught fumbling for words because you thought it'd be more natural to "wing it." There's no time for amateur hour here, so you'll need to write a killer script and execute it naturally on the call.

Memorize Qualifying Questions (or keep a list)

Similar to the above, you should either memorize your key qualifying questions or have a written list handy to refer to when on the call. In the case of in-person cold calls, memorization is the only option. Your list should contain three (3) primary questions that are the most important, plus 3-5 additional questions to further uncover needs.

Be Nice to Gatekeepers, Assistants, & Secretaries

98% of companies in America employ less than 100 employees. See for yourself at http://www.census.gov/econ/smallbus.html. The odds that a gatekeeper knows and speaks with the person you're trying to reach is very high, so you should never lie, cop an attitude, or be anything but polite and professional with them, no matter how they treat you.

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Key DO's and DONT's

DON'T

Be Caught Off Guard Not Knowing The Company

When making cold calls, volume is generally the key to success - the more calls the better. This doesn't leave tons of time to research every prospect in the depth and detail they probably deserve. Still, to be caught off guard knowing nothing at all about the company is a flagrant foul. Pull up the company website and scan it before you dial.

Interrupt or Raise Your Voice

New salespeople sometimes get caught up in the "race" of making calls and forget they must position themselves as consultative experts. A true consultant does not interrupt, raise their voice, or rush through their presentation. Instead, they speak slowly and ask key questions to better identify their prospects' needs. Stay calm and professional!

Forget to Use Your Full Name

True business consultants have nothing to hide, and are always ready to provide their full name, title, and the name of their company when making a new introduction. Using your full name conveys professionalism and adds weight to your conversation. Too many salespeople forget to use their full name; do not be one of them.

Lie to the Gatekeepers (or Prospects!)

Being dishonest will always catch up to you, the prospect will always find out later on from the gatekeeper, and it's not a good way to build a professional reputation. Instead of lying, send your prospect an email a day in advance, then when you call in tell the gatekeeper you're following up on an email - which is the truth. This strategy works well.