



# Sales Call Prep Playbook

Are you sabotaging your sales calls?  
Build a rock-solid sales strategy with call  
preparation.

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## Four Reasons Salespeople Lose the Deal

Could you be sabotaging yourself with these four common sales mistakes? It might be time to re-evaluate your sales strategy.

Do you find yourself placing the blame on others when your sales pitch goes sour time and time again? Unfortunately, it's common for salespeople to point the finger when they fail to close a deal, instead of evaluating their own sales strategy.

As a salesperson, you know how difficult it is to close a deal, but you may be sabotaging yourself by making these four most common mistakes.

### 1. You Know Nothing About the Customer

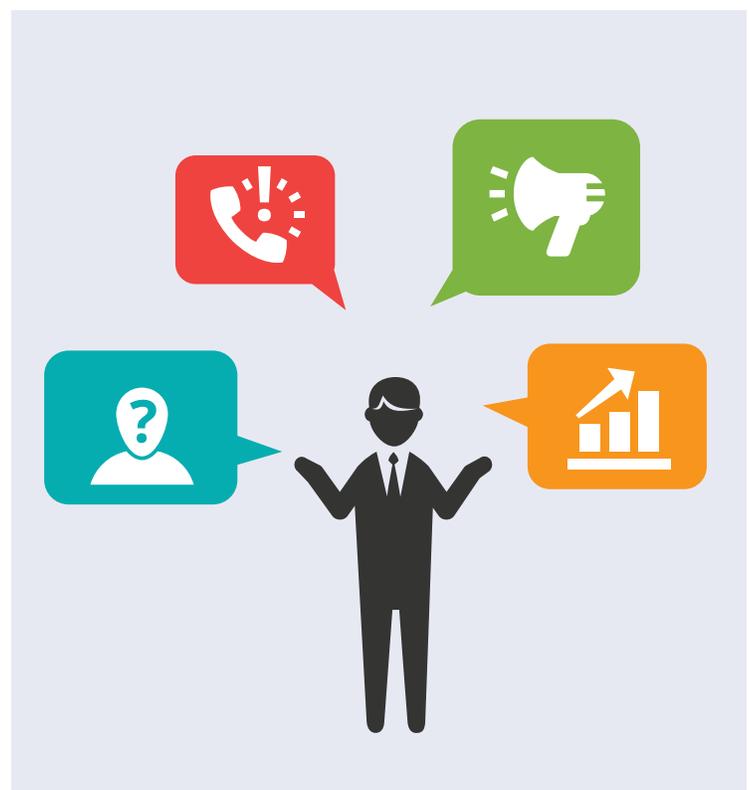
Before you even think about calling a prospective customer, you must research beforehand. Besides knowing the obvious like names and current positions, you should also research current company achievements, new initiatives, industry trends, and partnerships, among other things. In order to build the proper sales strategy, know your customer and their business like the back of your hand.

### 2. You are Completely Unprepared for the Call

Just like you, your customers don't have time for an unproductive call. A good salesperson anticipates what kinds of questions customers will ask and drafts the appropriate answers. If representatives don't have the answers at their fingertips, they should make it a priority to address the questions during the follow-up call.

### 3. You Talk About Your Company, Not About the Customer's Needs

Some of the most successful salespeople spend more time listening to their customers than talking. Odds are your customers already know what you do, so they don't need a 10-minute company overview. Instead of explaining why your company is different, spend time carefully listening to your customers needs.



### 4. You Focused on the What Not the Why

Why: Customers don't want to hear blanket statements like "we are trustworthy and reliable" or "our customers experience fast ROI." They want real numbers and proven statistics like how your customers experienced a 60% ROI within the first year. Instead of focusing on the what, focus on the why.

## What Do Salespeople Control to Help Seal the Deal?

Stop dwelling on what you can't control and focus on the things you can to improve the success of your sales strategy.

Unfortunately in sales, there are certain things that you just can't control: for example, the economy, competitors, and customers. Now's the time to stop dwelling on what you can't control and focus on the things you can. Check out these five things salespeople can do to help close the deal.

### How Much Market Research You Do:

Ask yourself – how well do you prepare for each sales call? Do you skim a buyer's website or social profile five minutes before a call? If so, you're certainly putting yourself at a disadvantage. The more prepared you are, the better understanding you will have of the in's and out's of your industry and the more likely you will be to be able to answer tough questions. Moreover, performing market research will help you craft a more detailed and targeted sales pitch, increasing your chances of closing the deal.

### The Amount of Effort You Exert:

The sentiment "hard work pays off" is especially important in sales. Don't wait for marketing to hand-feed you leads; be proactive and seek prospects on your own. Whether it's combing your CRM database for any leads left unturned or ramping up your presence on social media, the amount of effort you put into connecting with prospects will dictate the success of your sales strategy.

### Your Response Time:

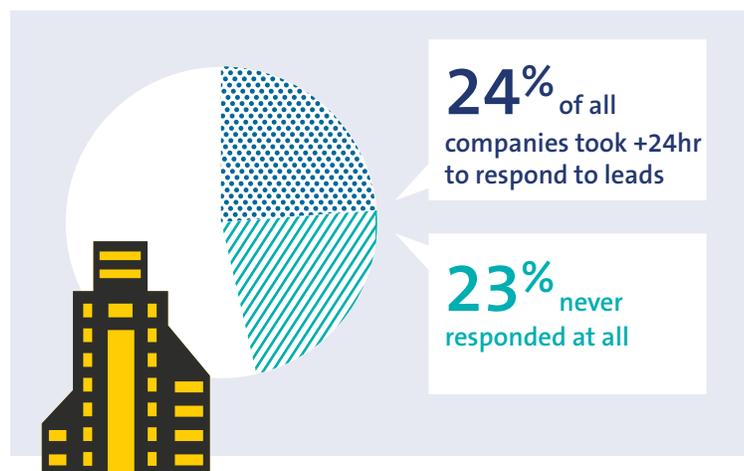
According to an audit of 2,000 U.S. companies by the Harvard Business Review, an astounding 24% of companies took more than 24 hours to respond to leads —and 23% never responded at all. While you might not be able to control the willingness of a consumer to respond, you can control how fast you answer them. Don't wait until it's convenient for you to respond; every minute you wait decreases your chances of closing the deal.

### How You Decide to Follow-up:

Shockingly, the majority of sales agents never follow-up with prospects. Just because your sales pitch is over doesn't mean your job is done. Circling back and closing the loop is critical in sealing the deal. However, make sure when you follow-up that you re-engage the prospect by offering something of value. For example, share with them a recent case study highlighting the success of an existing customer.

### How you Learn from Your Mistakes:

You're bound to make mistakes throughout your career, but it's the way that you learn and grow from those mistakes that will separate you from average salespeople. Sales strategies that worked in the past may no longer suffice. Understanding consumer and market trends will allow you to adjust your sales strategy and recoup past mistakes.



## How to Prepare for a Sales Call

You never get a second chance to make a first impression! Our experts share sales calling strategies that will help you build credibility and long-term relationships.

That first sales call is a make-or-break moment that only happens once, so you need to give it your best. That means diving more deeply into company history and industry trends, so you can carry on a conversation that builds trust — and ultimately, new business.

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As your sales team gears up to make contact with potential clients, consider the following points.

### Remember: It's Not About You

Your prospects aren't interested in your product. What they care about are their problems and how they're going to eliminate them. You're not selling a product; you're selling a solution, says Ron Cappello, CEO of Infinia Group, a New York City-based branding and marketing agency.

"As an example, someone may go to a hardware store and say they want to buy a drill bit, but what they really want to buy is a hole; the drill bit is the means to get what they want," he says. "You have to know what problem you're solving with your product or service. Figure it out and sell that."

### Ask the Right Questions

To understand exactly how your products and services will alleviate a company's pain points, you'll need to ask many open-ended questions during the sales call. As the saying goes, you have two ears and one mouth. You should be doing twice as much listening as talking on a sales call. But you need to know the right questions to ask first!

This is where pre-call due diligence pays off. Be aware of the resources available to you — trade associations and journals, company websites, annual and quarterly reports, 10K reports and online business information databases like Hoovers. Decide which sources will serve you best in the least

amount of time. Also, sign up for relevant news-feeds, e-newsletters and blogs to expedite your data mining. Try to answer as many of these questions before your first sales call.

### Company-specific research

- What is my prospect's market strength?
- What are the company's top business concerns right now?
- How is the company positioned to handle those issues?
- How does that company's revenue, profitability and market share compare to its peers?
- Who are the key decision makers in the company?

### Industry research

- Are companies in that industry generally growing or contracting?
- How is that industry perceived by others?
- What are some of the key opportunities in and threats to that industry?
- What are some of the key terms (industry jargon) used in that industry?
- How has that industry changed over the years?

What builds credibility in the prospect's eye isn't the fact that you did your research (that's expected!), but that you are using that information to ask

informed questions, says Ron Volper, author of “Up Your Sales in a Down Market: 20 Strategies to Win Over Cautious Customers.”

“For example, I recently read that a prospective client had reported record profits, so, early in the call I congratulated the executive vice president I was meeting with and asked her to talk about some of the factors contributing to her company’s success,” Volper explains. “Needless to say, she was happy to do so.”

### Send in the Right Person

One of the biggest mistakes a sales rep can make is to believe that taking an order is the same as making a sale, says Kyle Burchart, director of business development for Melton Logistics in Tulsa, Okla.

“Ten percent of reps will be true salesmen, or hunters. The other 90 percent are likely going to be order takers, or gatherers,” he says. “The key is to try and get your accounts and prospects in the hands of the right personality. Some accounts make sense to be with a gatherer personality, while others need to be with your hunters. I have seen it over and over where a cold account is switched amongst reps, and then it magically turns on. Sometimes, it’s all about matching the right personality to the prospect.”

### Position Yourself as a Thought Leader in the Industry

Nobody likes to be sold to, but most everyone appreciates a helping hand. That’s why sales reps who can reposition themselves as trusted advisors often prove more successful than the traditional product pushers.

Consistently reserve time for reading up on your target industry(s) — trade journals, news sites and the like — and generously share interesting tidbits and your two cents on the subject with those in your network. Take full advantage of social media tools, from blogging to Twitter to Facebook, to get your message out there. LinkedIn is a great resource for building a reputation as a thought leader among professional communities, according to LinkedIn marketing expert Kristina Jaramillo. She makes the following suggestions:

- Transform your LinkedIn profile from a straightforward résumé to an interactive online experience, where people can access informative



presentations, videos and articles about their industry. “The profile needs to showcase the person’s areas of expertise and speak to the target audience’s needs, challenges and wants,” Jaramillo says.

- Join LinkedIn groups that are popular among your target audience and actively engage in conversations, ask questions and post content in those groups.
- Seek to connect with prospects and potential referral sources, and then invite those new connections to join your LinkedIn groups and communities. This way, you will be a familiar (and hopefully respected) “voice” long before you make a sales call. In this situation, prospects are more willing to engage and build a relationship once you make contact, Jaramillo says.

If you have a blog or website, there are software programs that allow you to see what visitors are downloading and which pages they’re viewing, says Nick Robinson, director of client services for Social Media HQ.

“Upon calling your prospect, you will have enough intelligence from their download behaviors and website viewing to cater a sales consultation to their approximate needs,” he says. “In addition, if you have the ability, check out their LinkedIn and Twitter profiles to see their background and the types of things they are passionate about.”

Cappello says the goal of any sales call should be to form a long-term relationship with your prospect that pays multiple times, over time.

“Selling is a process; don’t ever think of it as an event,” he says. “At the end of each day, force yourself to make

one more call or one more contact. The discipline will make you think through what you’ve done that day and plant another seed needed to get a sale. It’s that simple, and that hard.”

## Pre-Call Checklist: 3 Steps to Better Prospecting

Just as a morning routine helps start the day, your pre-call sales routine can set you up for a stellar sales pitch. Take time to review your pre-call checklist.

Your sales routine should effectively prepare you for each call. If not, then it might be time to reevaluate your checklist and consider adding these three essential steps.

### 1. Research

How much research do you perform before each call? If you answered “a little,” then you’re not doing enough. Cold calling a prospect armed with just their name and title no longer flies. Today’s consumers don’t want to listen to a generic sales pitch they’ve already heard hundreds of times. Instead, they want to engage in meaningful conversation. Today, the companies that garner the most success are those that have real, genuine dialogue with consumers. But before two-way dialogue can happen you first have to do some research.

- **Consumer Research:** Before contacting a prospect, learn everything you can about them. How long have they been at the company? Where did they previously work? The more personal, yet useful, information you have the better, as this will help you create a more personalized pitch. Look for prospects on LinkedIn, Facebook, and Twitter, or contract the help of a third-party database to get full executive bios.
- **Market Research:** It’s not enough to just research your prospect; you have to research the market where they do business. Consumers want to



partner with a company that understands the market’s biggest pain points as well as where it’s going. Brush up on industry financials, trends, and competitors.

### 2. Set a Goal

While it may sound slightly elementary, setting a goal for each individual call will ensure you get what you need. As you know, all calls are not the same. More than likely, you’ll have a handful of prospects at different stages in the buying process, meaning each call has to be treated differently and yield a different outcome.

For example, if you're cold calling a prospect for the first time, your goal may be to build rapport while also learning how you can help them. If contacting an existing customer to cross-sell another product, your plan might be to introduce the product and gauge the prospect's interest. If you don't know what you want to get out of your call, then you're not only wasting your time, but their time as well.

### 3. Check Your Ego at the Door

Remember; it's not about you. Today's leads are more educated on companies' products and services, thanks

to the Internet. Keeping this in mind, don't waste their time discussing product specs and features. Instead focus on how your product or service can help eliminate his or her biggest problems and concerns. A sales call isn't the time to gloat about your company's winnings; it's a time to listen to your customers' problems and figure out a way to fix them.

## Perfect the Follow-Up Sales Call

Don't waste time dreaming of a one-call close. 55% of reps admit they don't follow-up. Set yourself apart with these follow-up tactics to close the deal.

Any seasoned salesperson knows that most sales are rarely closed on first contact, which is why it's so shocking that salesmen fail to follow-up with prospective leads. In fact, many salespeople don't conduct follow-up sales calls. However, follow-up is a critical element in securing business, and the more time that passes the less chance you have at closing the deal.

There are several reasons why salespeople fail to follow-up with leads. They may not have enough time; they don't want to appear too pushy; or they simply don't know the proper way to go about it. Whatever the reason, the fact remains that following up is an essential part of the sales process and shouldn't be overlooked.

If you have yet to implement follow-up best practices into your sales strategy, below are a few tips and tricks to get you started down the right path:

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#### Start with the First Point of Contact:

Believe it or not, the first step in completing an effective follow-up call starts with how you handle the initial point of contact. On your very first call, establish some commitment, or next steps, that will help move them down the funnel. For example, promise to provide them with collateral material, such as a case study or whitepaper. Make sure, however, that you offer up something that the prospect finds valuable.

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#### Get Organized:

With dozens of contacts, it can be difficult to get them all straight, not to mention remember what you said to everyone. But clients won't feel secure about doing businesses with a company that's unorganized. If you haven't already, invest in a CRM tool that will track and organize all consumer information including names, phone numbers, and other information about a client or prospect. This way when you need to follow-up with a client, all you have to do is log into your CRM tool and access the data you need.

**Be Prepared:**

Don't assume that a prospect is screening your call and won't pick up. Be prepared when the voice on the end of the line says, "Hello." While having notes handy to help remind you of important points can be beneficial, avoid reading off a script – it will only serve to have you come across as disingenuous. Be prepared to offer up something new; for example, recent market research or pricing options.

**Vary Your Methods of Communication:**

While it may be hard to gauge what communication method your prospect prefers in the early stages of the buying process, it's helpful to vary up what channels you use. Email is a great method, but remember your prospect's inbox is probably already bombarded with messages so you run the risk of getting overlooked. Because of this, be sure to personalize the subject line of the email to avoid landing in the spam folder.

**Ask for the Sale:**

You've invested substantial time in your prospects, so don't forget to ask for the most important thing – the sale. If your prospect says no, take the opportunity to find out why as this will help you improve your sales strategy moving forward.

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