

Chapter 13: Prospecting by Phone

Cold Calling Checklist

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INSTRUCTIONS:

Use the checklist on the following pages to make your cold calling process as smooth and effective as possible – from start to finish.

Do this and you'll have a pretty good chance of winning the deal. Leave any factor to chance and you put yourself at risk of losing.



Plan Ahead

- ☐ Start with needs
- ☐ Talk to your current clients
- ☐ Don't use marketing-speak
- ☐ Test out a "straw man"
- ☐ Evaluate what resonates and what doesn't



Know the value proposition for the prospect for attending a meeting with you. It isn't enough just to "introduce them to your services." You need to have the WIIFM (What's In It For Me) for simply attending the meeting.



The right list is more important than the right style. Think carefully about who you are targeting for these conversations.

Make Sure Your Call List is Prepared and Ready to Go

- ☐ What titles?
- ☐ What industries?
- ☐ What buying influence?
- ☐ What geography?
- ☐ What specific companies?
- ☐ What spending power?

Carve Out Your “Selling Time” and Make it Sacred

- ☐ Quantify the potential value to your firm
- ☐ Commit yourself to follow through
- ☐ Make the first call, and continue from there

Tip: Assign a goal for the day and/or calling block, and make sure it's achievable



Know What You're Going to Say When:

- ☐ A real person picks up
- ☐ The administrative assistant picks up
- ☐ No one picks up and you get a voicemail recording

Tip: When calling C-level people, plan to call very early or after 6:00 p.m.





Practice Your Calls

- ☐ Select a “cold” or “warm” call you will need to make soon
- ☐ Script out the call using the appropriate call approach outlined in *Rainmaking Conversations*
- ☐ Practice with a colleague, friend, or other trusted person

Immediately Before the Call

- ☐ Exercise your voice before the first call
- ☐ Have calendar dates ready for the meeting
- ☐ Call in blocks to get on a roll. Pick a number (i.e., make 10 calls in a row)





During the Call

- ☐ Take only 20-25 seconds (or less) to introduce yourself and state the reason for your call.
- ☐ Don't try to give too much information on the first call
- ☐ Project confidence. Speak colleague-to-colleague. Don't apologize for calling them.
- ☐ Give yourself energy. Stand up if you need it
- ☐ Talk slowly in order to be understood
- ☐ Don't read word for word from a script, and don't "copy-speak." Be genuine
- ☐ Ask for a meeting on specific dates, and don't just ask "Would you like to meet with me?"
- ☐ Listen! It's easy to misinterpret what people say. Make sure you communicate well and listen to your prospect when he talks

After the Call

- ☐ Record the date and time that you called the person, even when you don't reach them.
- ☐ Think about the call that just happened: Is there anything you'd do differently? How do you feel it went? Think about what's going on, and learn.
- ☐ If you have regrets about the call you just made, shake it off. Learn from your mistakes, try to improve, and don't let it stop you from getting back on the horse and dialing your next prospect.
- ☐ If you're at the end of a calling block, take a break. Walk outside, grab a bite, rest, and get ready to come back refreshed





General Guidelines for Success

- ☐ Make sacred selling time – and stick to it. You need consistency to improve and to measure your results.
- ☐ If you're procrastinating, STOP! And start making calls. Cold calling may or may not feel right for you, but to set appointments it works well.
- ☐ Don't stop until you've made all your calls. Keep dialing. It's partly a numbers game
- ☐ Be genuine when you speak with people.
- ☐ Keep in mind the more pleasant conversations you've had. You may get the occasional unpleasant person, but the majority of people in the world are respectful.
- ☐ Integrate cold calling with mail or other ways of contacting people and you will increase your response rate.