



## Running a Top Notch Exploratory Call – Part 2

*Using the Exploratory Call to Excite & Qualify*



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# The Successful Selling for Agencies series

## 1. Successful Agency Selling Introduction - On Demand

*Position Your Agency For Growth*

## 2. Running a Top Notch Exploratory Call - Part 1 - On Demand

*The Exploratory Call Discussion Guide*

## 3. Running a Top Notch Exploratory Call - Part 2

*How to Excite and Qualify Your Prospects*

**Today's Session!**

## 4. Live Lab: Agency Grader - Jan 12

*How to Use the Agency Grader to Improve Your Agency*

## 5. Proactive Prospecting - Jan 19

*Stand Out and Connect with Prospects*

## 6. Live Lab: The Connect Call - Jan 26

*Open the Sales Conversation and Book the First Meeting*



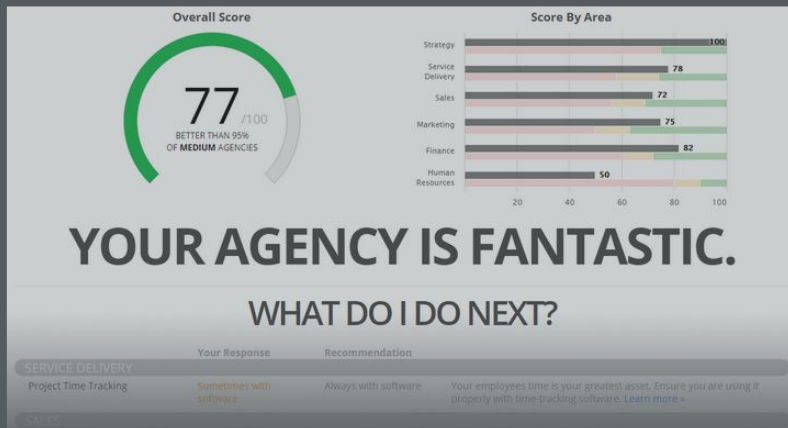
**Series resource page** (featuring on-demand recordings of previous sessions): <http://bit.ly/ssfa-resources>

# AGENCY GRADER<sup>BETA</sup>

ANONYMOUS BENCHMARKING AGAINST 500+ MARKETING AGENCIES.

CUT THROUGH THE FOG. IDENTIFY REAL AREAS OF IMPROVEMENT.  
LAY OUT A STRATEGY FOR GROWTH.

Grade me »



<http://agency.grader.com/google>



# Agenda

- 1 Why and what is excite and qualify?
- 2 How to excite
- 3 How to qualify
- 4 Next Steps and resources

# 1 Why and what is excite and qualify?

## Reminder - We are looking to become a growth partner with our clients

*“Our new process has resulted in **longer-term relationships** with our clients, where we truly become invested in the client’s success and enjoy a **real sense of partnership** with many of them...We become yoked to our clients, and them to us, as though we’re on a journey together. **Our wins and losses are mutual.**”*



Mike Skeehan  
Founder, Salted Stone  
Greater Los Angeles



# Reminder from Last Session

We are looking to be a 'growth partner'

✓ Summary

*Stop pitching.  
Aim to Help.*



✓ Summary

*Sharpen  
your  
Unique  
Selling  
Proposition*



✓ Summary

*Structure  
Your Sales  
Process*



Reminder - Avoid the **dog and pony show** - use the Exploratory Call to talk about growth





## Reminder - How We Tee'd Up the Exploratory Call

*“Let’s schedule an Exploratory Call.*

*I’ll **offer** some marketing tips on your website and share some industry insights.*

*We can talk about your **business and goals...***

*and ultimately, we’ll decide if there a **mutual fit** to continue our conversations“*

- Soundbite used to schedule the Exploratory Call



## Reminder - The Exploratory Call Discussion Guide

- ☒ Begin the call
- ☒ Review the company & organization
- ☒ Assess need & timing
- ☒ Cover why you and your services
- ☒ Close the call

**Reminder - We reviewed that uncovering need and timing are at the heart of the Exploratory Call**

Two large, solid red hearts are positioned side-by-side, slightly overlapping. The left heart contains the word 'Need' in white, and the right heart contains the word 'Timing' in white. A dark grey ampersand is placed between the two hearts, centered vertically. Below 'Timing' on the right heart, the phrase 'are at the heart of the exploratory call' is written in white, stacked in three lines.

Need & Timing  
are at the  
heart of the  
exploratory call



**Reminder - we reviewed that determining need & timing can be tricky**

**Prospects **don't**  
**always reveal** their  
needs**

**Or they may **not** have  
**thought through** it  
themselves**

# Reminder - to really uncover need and timing requires both exciting and qualifying prospects

Exciting nurtures  
enthusiasm and  
open communication



Qualifying surfaces  
true need and timing,  
and mutual fit.

For the remainder of this call, we'll focus on 'How' to excite and qualify!  

## 2 How to excite



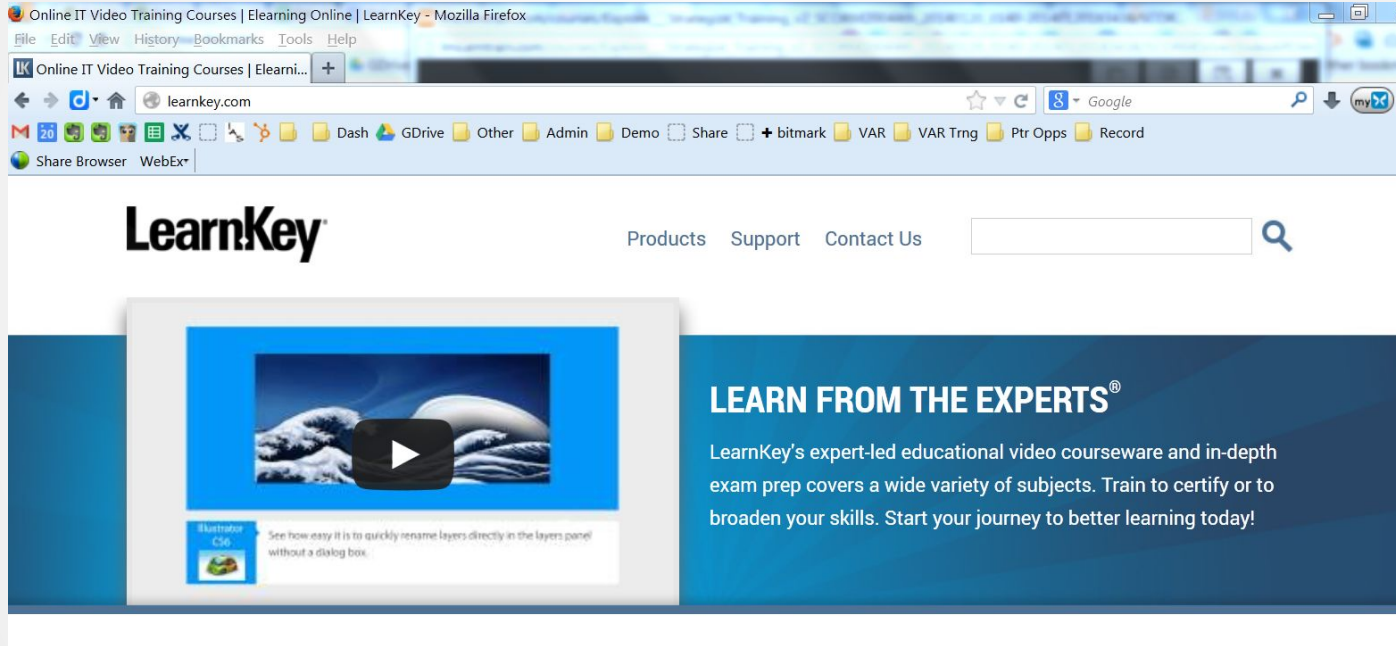
# POLL QUESTION

*A conversation with  
marketing tips is especially  
effective*

aka the **eGIVE AND GET.**



# Let's run through an example



**\*Although Learnkey is real, any details mentioned in the examples are purely fictitious**



# A tip to introduce content marketing and SEO

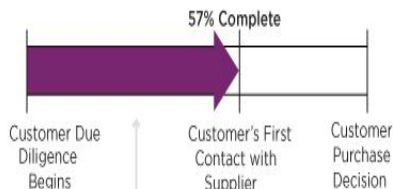


57% of the purchase decision is complete before a customer even calls a supplier.

What are you doing about it?

Download Customer Qualification Assessment

## Customer Purchase Decision Timeline



Through this period customers have largely decided on their needs, leaving suppliers to compete on price.

n = 1,460.

Source: <http://bit.ly/ceb57percent>

## Marketing Tip – Give:

*“Mr. Prospect, the latest research indicates that 57% of the purchase decision is completed before a prospect even contacts the supplier. This is a huge shift. If a company can get in front of a prospect early in the process, it can set itself apart. The way to do this is with great educational content that is optimized for search engines and social media.”*

## Get:

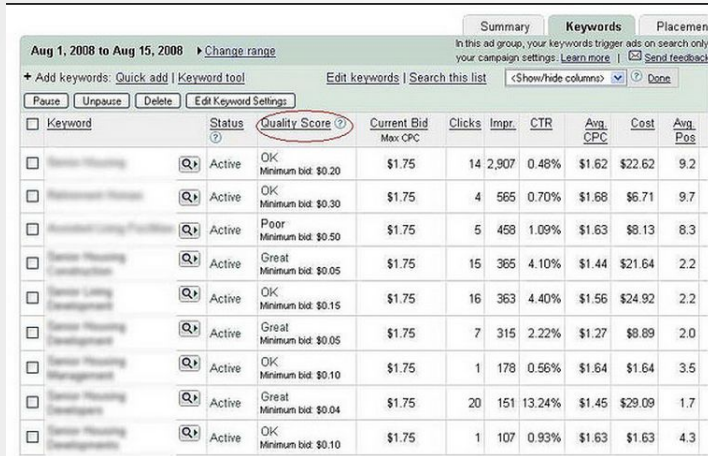
*“I’m wondering, is this trend relevant for your business? Are your prospects doing research online well before you hear from them? Is it important for you to get in front of prospects earlier? Why?”*



# A tip to drive traffic more efficiently

## Marketing Tip – Give:

*“Ms. Prospect, if your AdWords quality score is higher, you’ll have better results and lower costs per click. Keep an eye on it, work to improve it, and allocate budget towards keywords that have high quality scores to get more qualified traffic for your dollar.”*



Keyword	Status	Quality Score	Current Bid	Clicks	Impr.	CTR	Avg. CPC	Cost	Avg. Pos.
...	Active	OK	\$1.75	14	2,907	0.48%	\$1.62	\$22.62	9.2
...	Active	OK	\$1.75	4	565	0.70%	\$1.68	\$6.71	9.7
...	Active	Poor	\$1.75	5	458	1.09%	\$1.63	\$8.13	8.3
...	Active	Great	\$1.75	15	365	4.10%	\$1.44	\$21.64	2.2
...	Active	OK	\$1.75	16	363	4.40%	\$1.56	\$24.92	2.2
...	Active	Great	\$1.75	7	315	2.22%	\$1.27	\$8.89	2.0
...	Active	OK	\$1.75	1	178	0.56%	\$1.64	\$1.64	3.5
...	Active	Great	\$1.75	20	151	13.24%	\$1.45	\$29.09	1.7
...	Active	OK	\$1.75	1	107	0.93%	\$1.63	\$1.63	4.3

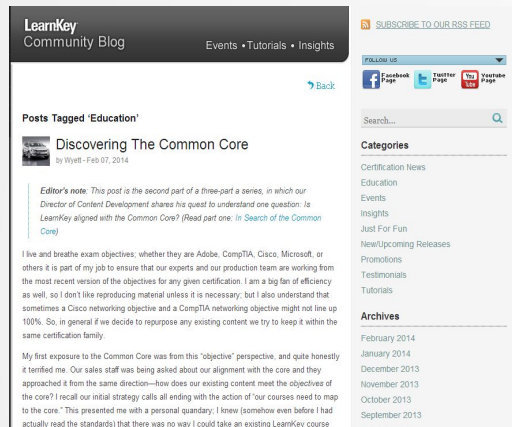
Image Source: [TopRank Online Marketing](#)

## Get:

*“I’m wondering, how does AdWords tie into your traffic generation strategy? Is it important for your business to drive more website traffic? Are you driving the right kind of traffic today? What has held you back? What impact would increased traffic have on your business?”*



# A tip to convert visitors to leads



## Marketing Tip - Give:

*“Mr. Prospect, you are doing a great job driving traffic, but I’m going to venture a guess that your conversion rate from visit to lead isn’t as high as you’d like. I have a tip for that...You should include a couple calls to action on every page, and 1 at the bottom of every blog article.*

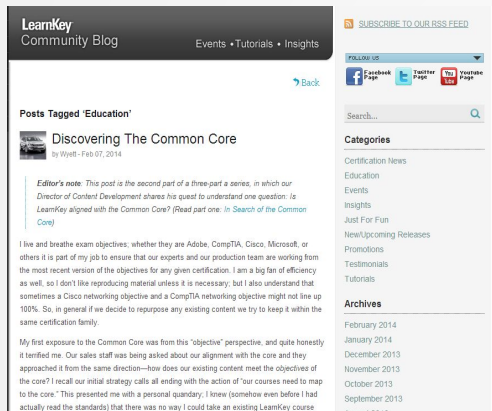
## Get:

*“I’m wondering, how is your visit-to-lead conversion rate? What does your ideal lead look like? Have you discussed some leads goals this year? How is it going?”*



# A tip to convert leads to customers

## Marketing Tip – Give:



*“Ms. Prospect, if you are converting leads and then you start to nurture them, you can shorten your sales cycle. Were you aware that nurtured leads have a 23% shorter sales cycle\*? Nurturing leads can also encourage your sales team to become more consultative in nature as they will encounter leads earlier in the buying process.”*

## Get

*“How are you currently nurturing and segmenting leads? Tell me about your sales process? Are you happy with your connect and close rates? How do your reps currently handle inbound leads?”*



\*Source: Market2Lead - <http://bit.ly/23leadnurturing>



Warning: For best results use these tips in the context of the conversation, not just rapid-fire one after the other

?

What techniques were just demonstrated to excite the prospect?

*Answer: See next slides!*

# An 'excite' checklist

*5 best practices of giving and getting using marketing tips*

## 1. Excite across the sales & marketing funnel

- Drive traffic
- Convert traffic to leads
- Convert leads to customers

## 2. Be specific and meaningful

## 3. Do more asking than telling - no pitching!

## 4. Aim to touch a nerve (politely)

## 5. Hold off on proposing a full solution just yet





*How we **doin**'?*

# 3 How to qualify



# Qualifying in Sales



Qual-i-fy  
/kwälə, fī/  
verb

In selling, the process of determining if a certain prospect has characteristics that qualify them to advance in the sales process

# Qualifying Ultimately Helps the Agency \*and\* the Prospect



**Do they need our help?**

**Do they want our help?**

**Can we help?**

## How to qualify a prospect

- ☒ Use BANT
- ☒ Assess need, which is the trickiest element of BANT

## How to qualify a prospect

- ☒ **Use BANT**
- ☒ Assess need, which is the trickiest element of BANT

# QUALIFY USING BANT

**B**udget

**A**uthority

**N**eed

**T**iming

# DETERMINING BANT THROUGH QUESTIONS

The best way to determine BANT is through questions. Some examples are below

## **(B)udget –**

- What marketing do you invest in today?

## **(A)uthority**

- Tell me about your role in the company?

## **(N)eed**

- What are some key initiatives you are working on?

## **(T)iming**

- What is the most critical date on your calendar? Why?





*In additional resources, find  
a link to the Exploratory  
Question Guide*



**Think of the name of a recent prospect of yours. How would you rate the overall BANT of the prospect on a scale of 1 to 10?**

**1 = This prospect is never going to buy**

**10 = The prospect will buy this afternoon**

# Rating and ranking prospects using BANT

## If a prospect has a low BANT...

- Deprioritize  
...or...
- Probe deeper  
...or...
- Assign more homework

## If a prospect has a high BANT

- Spend more time and effort

## How to qualify a prospect

- ☒ Use BANT
- ☒ **Assess need, which is the trickiest element of BANT**



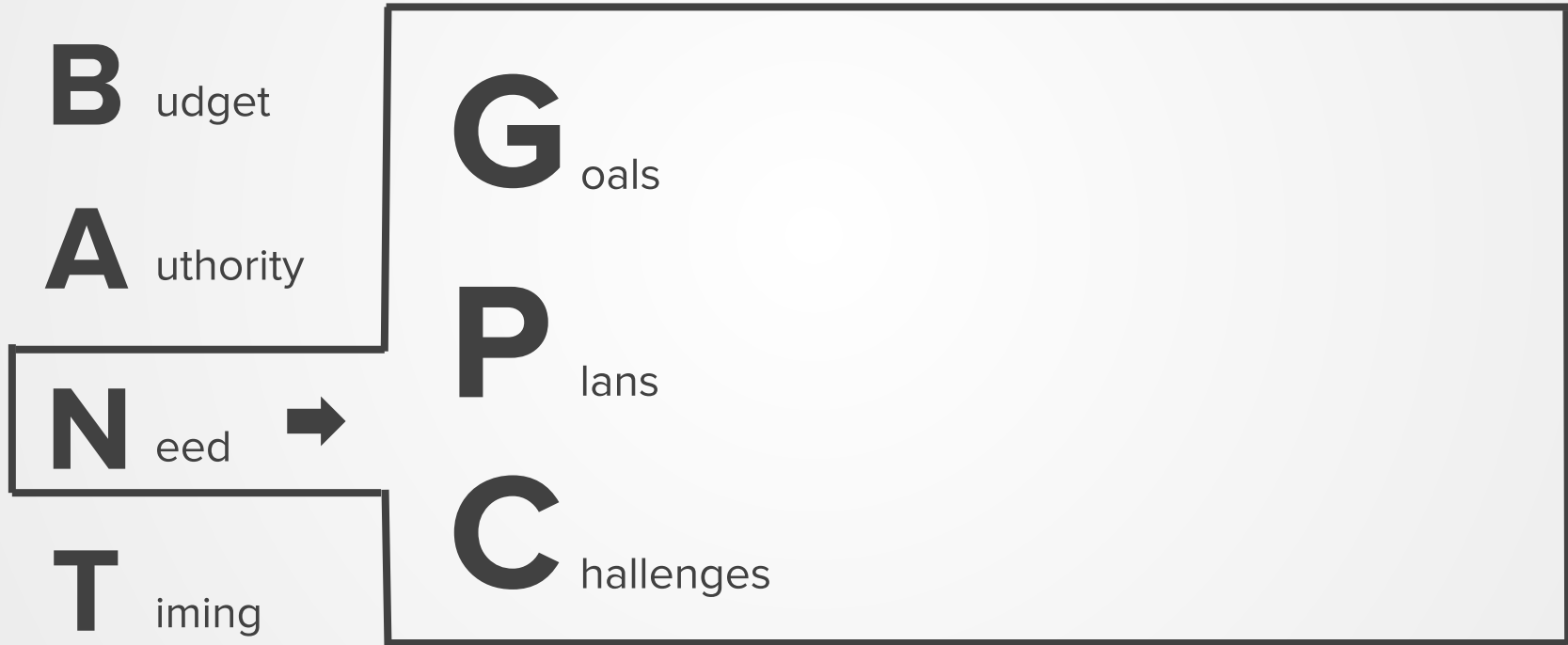
A prospect says “I need more leads from my site yesterday. Growing my business is important to me.”

Does this prospect have qualified Need?

*No – see the next few slides!*

# Need is the trickiest aspect of BANT

*GPC Helps Us Figure It Out*



# A prospect with real need will have good GPC

## What good GPC sounds like (example):

SPECIFIC, MEASURABLE, TIME-BOUND, HAS CONSEQUENCES

*“We need to grow revenue 25% by year end. If we don’t, we won’t be able to fund our new expansion. If this doesn’t happen, we’ll see management shake-ups. If we can increase website sales by 15% that will help. Social media and SEO alone haven’t worked for us. We need something better. “*

## What weak GPC sounds like (example):

GENERAL, NOT TIME-BOUND, NOT ALWAYS REALISTIC

*“Our competition is heating up. Our website is not helping us drive enough leads and we need more leads yesterday.. “*



# GPC is uncovered through questions

- For some great questions to help uncover prospect GPC and the consequences attached, see the [Exploratory Question Guide](#)



Besides GPC, to assess true need...

*It helps to know the **Cost of  
Inaction***

# David's Favorite Question in the Sales Process

## – the Cost of Inaction

*“Have you ever considered doing more of what you are doing today as a way of reaching your goals?... Why not?”*

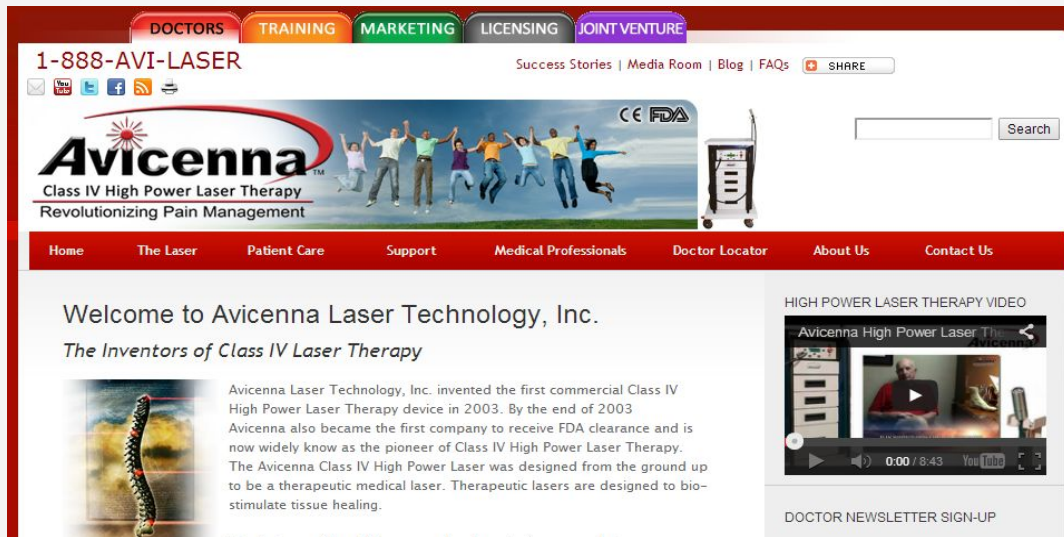
\* For more great questions on the Cost of Inaction, see ‘Why the Cost of Inaction Needs to Come Before ROI’ from Inflexion Point – <http://bit.ly/costofinactionvsROI>



## How to qualify a prospect

- ☒ Use BANT
- ☒ Assess need, which is the trickiest element of BANT

# EXPLORATORY CALL ROLE PLAY



For an example of both exciting and qualifying on a single call, check out the Corey and David recorded [Exploratory Call role play](#) and included break down.

*How we **doin**'?*

# 5 Review and next steps

# AGENCY GRADER<sup>BETA</sup>

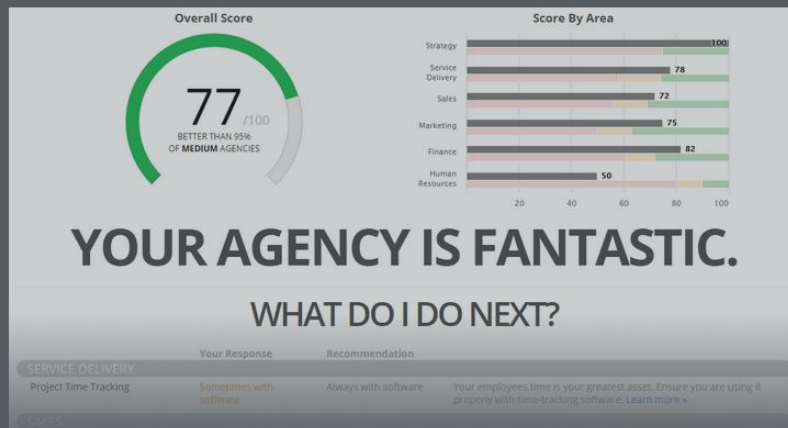
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Want to  
volunteer ?

Grade me »

Tweet 4



<http://agency.grader.com/google>



# Learning objectives

## Last session - The Exploratory Call Discussion Guide:

- How to take a natural conversational path through the Exploratory Call
  - includes how to begin, conduct, and close the call including sound-bites!
- How to use 'Power Moves' to control the call
- How to avoid falling into the proposal trap

## This session - How to Excite and Qualify your prospects

- How to excite to capture interest and advance the sales conversation
- How to quality to assess mutual fit



# NEXT STEPS / RESOURCES

1. Review the **Exploratory Call Role Play**
  - <http://www.davidweinhaus.com/exploratory-call-role-play>
  - Identify concepts from this training demonstrated in the call
2. Check out the **Exploratory Question Guide**
  - <http://bit.ly/exploratoryquestionguide>
  - Select questions to add into your process
3. Check out the **Opportunity Review Worksheet**
  - <http://bit.ly/OpportunityReviewWorksheet>
  - Use it to help gameplan an upcoming call.
4. **JOIN US ON JANUARY 12TH FOR OUR NEXT SESSION!**
5. **Have a great holidays!**



What was **ONE**  
**KEY TAKEAWAY**  
from the session?



# Please let us know how helpful you've found this training to be so far

- 3 question survey!
- <http://bit.ly/ssfa-survey1>

Please complete whether watching live or on-demand



# QUESTIONS?



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