



## **Greater Relationship Outcomes: Phone Tips, Phone Success, and Phone Steps (2-2)**

### **What are some things you should do before calling anyone?**

#### **Get Your Attitude Set!**

See the value of what your customer is getting. Review the entire company website. Review the products and services you offer. Review your goals in accordance with your weekly activities. Make sure you have reviewed our Steps for Success Training and understand the value, support, and **Tools**.

If you understand the value, the opportunity, the system, what you will be able to do for the client, and the team you have, you will have the passion you need, and others will catch this passion. This passion will produce more success because people will see it!

#### **Ask Questions and Listen**

Be a person of few words. Listen and you will have respect from the person you are talking with.

#### **Email Your Website**

Include the person's name in the title of the email. If you do not have their email, ask them on the phone for it. Then, let them know you will be emailing them some information about your solutions based upon what they shared with you (their challenges, needs, problems), as well as regular email updates.

**Call and email each person a day or two after you have talked to them the first time to ensure they received your email and ask them how you can be of help.**

**Email them on a regular basis. Refer to step 3 above.**

**If you get voice mail leave a message as if you were talking to the person without the voice mail.**

Call each prospective client back every few months about the last meeting and/or conversation you had with them (therefore it is very important to keep detailed notes about the person, their needs and wants, personal areas, and any other areas).

Only call people that are interested on the first call. If you do get voice mail, you will not be able to ask questions.



Let each person know that you can help them with their needs (only let them know if this is true).

You can help them meet the needs of their organization. Then, email them as a follow up with your website, any added information, strategies, brochures, etc.

Continue following up with each prospect on a regular basis to build long-term relationship. This will build trust over time. This is one of the main reasons why people become clients - trust.

**Regular communication is the key.**

### **Ways to Call Prospective Clients and How-to Follow-up**

#### **A – Local Business Calling**

This is for calling businesses in the yellow pages in your territory

The first thing you will do is to keep track of each business in your prospecting record book (in Word, Excel, a binder or your CRM system).

This would include tables that have the company name, date, contact person, phone number, email address, notes/needs, and next follow-up date.

The second thing you will do is call the prospect with the following script:

*Hello,*

*May I speak to the owner or manager and what is their name (this is what you ask the receptionist or the person answering the phone)?*

*Hello \_\_\_\_\_, this is \_\_\_\_\_, I represent \_\_\_\_\_ (your company name). I am a local business owner or businessperson.*

*I would like to email you some material that will show you how we can help you \_\_\_\_\_ (what are the solutions you are providing / what is going to make the prospective clients life better?).*



*What is your email address?*

*I will send you an attachment/flyer that outlines how you can benefit with our solutions \_\_\_\_\_ . I will call you back in a few days to answer any questions – is Tuesday or Wednesday better?*

*Have a wonderful day.*

**Email to send:**

*Hello,*

*Thank you for your time.*

*Attached is the information I spoke to you about regarding some of the solutions that will help you to \_\_\_\_\_ .*

*I will call you as discussed.*

*If you have any questions, please let me know.*

*Sincerely,*

*You're Name*

*Website*

*Phone Number*

*Email Address*

**B – Purchased Leads**

This is for calling those who have requested more information about the solutions you provide

Again, keep track of your prospects always in your prospecting record book – Follow up is one of the key factors for success in any business.

Greet your prospect.

*“Hello, this is \_\_\_\_\_ a local businessperson or owner; you filled out several questions about how you would like to get more information about how to \_\_\_\_\_ . Do you remember*



*doing this? Great.”*

Tell them, *“I just emailed you the information with:*

*“Hello \_\_\_” (their name) in the subject of the email. Email them your website and your personal information, along with a brochure / presentation. Include your name, phone, and email.*

*“Is this a suitable time? I need about 3 minutes of your time to explain the flyer/brochure just emailed to you as well as how we may be able to \_\_\_\_\_.”*

If the person says yes, explain what we do, as the prospective client reviews the flyer with you. Answer any questions they have. Then, set up an appointment with them to go deeper with their needs and challenges. This is the next step in building trust, finding out more about them, and assessing their needs so that you can provide a solution.

If the person tells you that it is not a suitable time to talk, ask them, *“would it work better to call you tomorrow or would the next day be better?”* Set the day and time to call them. Then, call them at the set day and time. Tell them, *“In the meantime, you can review the flyer and write down your questions for when I call you. Have a wonderful day.”*

In all correspondence, faxes, emails, meetings, and appointments, let each person know about your website and if they have any questions, a lot of detailed information and answers are at your website and/or feel free to email and/or call.

### **C – Set Appointments**

These are prospective clients where our sales appointment partner has set the appointment for you to meet the client.

*“Hello \_\_\_\_\_, this is \_\_\_\_\_ a local businessperson with \_\_\_\_\_. We have a meeting on \_\_\_\_\_ day, at \_\_\_\_\_ AM/PM. I have just sent you an email with my personal contact information.”*

*“I have included our website – you can review this for more information.”*

*I would recommend about 30 minutes for us to meet to review, summarize your needs, and see how we may be of help.*

*“I look forward to meeting you.”*



## D – Calling on Businesses

These are people that you go to see – business to business in your territory.

You will follow the same methodology as calling on the phone to your local businesses. The difference is, you are going from business to business asking to speak to the manager and/or owner, gathering their information (business card) and giving them your business card. Then, you follow up by email and/or fax and phone call.

## E – People You Know

This call is for the people that know you (the people that you have emailed personally – friends, family, business associates, chamber of commerce, networking, associations, etc.)

*“Hello, \_\_\_\_\_. This is \_\_\_\_\_. I just emailed you some information about how you and your company can \_\_\_\_\_ (your solutions, what you offer, your products and services). Attached is a flyer that briefly describes the process. Please take some time and review the flyer and our website.”*

*“Would tomorrow or the next day be better to call you back and answer any questions?”*

*“Have a wonderful day!”*

## Close Each Person by Soft Selling

**Let the person know what your Unique Selling Proposition is. What are you bringing to the table? What makes you different from those in your space?**

**Always present an attitude that thanks each person for their time and let them know that you are there for any questions via email and phone.**

**Our Goal is to build relationships with long-term clients (PEOPLE) who we want to do business with. We do not want to do business with just anyone, even if it is profitable.**

## Important Note

If the prospective client does not want any more emails and/or phone calls, take them off the list immediately. If you send anything else after they have told you not to, you are violating their space, and we only want to pursue those who value a mutual beneficial relationship.



“Success is a collection of relationships.” JC Penney

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