Transcript – GET to YES Podcast

E15: B2B 3 Steps to Cold Calling

Hi, Neil Osborne from The Sales Catalyst here. In this episode, we're going to continue the journey towards building your sales territory through new business acquisition, resulting in more new accounts being opened.

The next skill you need to master in order to grow your sales territory, is the ability to develop a plan for your calls – particularly your cold calls.

In this episode we're going to discuss your call plan in the context of doing cold calls, however much of this will also apply to your normal day-to-day calls with existing, active clients. (BTW when I say cold calls, I mean physical calls, not telephone calls.)

When I talk about developing a plan, I'm referring to the steps and actions you need to take *prior* to doing a call. I prefer to break it down into three clear steps:

1. The Pre-Call Plan – the steps you take prior to the call itself
2. The Call Plan – how you're planning for the call to play out
3. The Post-Call Plan – what you need to do after completing the call

Let's start with the Pre-Call plan – these are the steps you need to complete prior to visiting a business.

The following steps will also help when you're looking to find and approach the larger, more prestigious businesses:

1. Be clear about your Brand Avatar

If you haven't done it already, listen to Episode 13. You need to be clear on who your Brand Avatar is – or in other words, your ideal client. It's important to be clear about the markers for your Avatar, because they're what you'll be looking for when your doing your call plan.

2. Consult your territory plan

What suburbs are you focusing on? And why? What are you looking for – a large account in the area, or are you looking for more second-tier clients to reach your desired distribution numbers? One client I work with, has a distribution plan that targets three types of businesses. They've found that having one of each type in major postcodes, works well – for them, their clients and their overall brand sales.

3. Target the type of client

What type of business are you looking for? Where are they located? Are they typically in large A-grade shopping centres, or is it a smaller suburban shopping centre? Or is it an off-street clinic that may be located in a house? Where do you expect them to be located?

4. The client

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Before you visit, you need to understand the client that you're going to visit. Have you visited their website? What type of treatments and services do they appear to focus on? Have you visited their social media spaces – what are they talking about with their clients? Have you reviewed their pricing? Is that complementary to what you offer?

You'll probably be able to deduct what other brands they're currently working with and/or if retail is a large part of their business focus. Their website may talk about the owner, the number of staff, their businesses' purpose, other areas of interest or their involvement within the community or the industry.

There's so much you can find out about them in just 10 minutes, before you walk through the door. Today there's absolutely no excuse for going into a business without knowing quite a bit about them beforehand – all the answers are accessible via the browser on your phone. Plus, how do you think the client will react when they realise that you've done your homework… they'll be impressed and in turn may even give you some extra time. That's a far more positive start than using the approach, "I was just walking past and thought I'd pop in." It's no wonder that approach doesn't work, especially with larger clients.

5. Your materials

What materials do you need for your conversation with this client? I must admit this area alone can take up quite a bit of time when I'm doing a team training session. The questions I get asked most, is what I should take into a cold call?

- Should I take product samples?
- Should I take my presentation folder?
- Should I take my trolley case?
- Should I prepare an information folder as a leave behind?
- What should I take with me?

My answer is, it depends.

- What's the objective of your call?
- Have you parked the car, got your comfy shoes on and are going to walk the suburb?
- What type of business is your Brand Avatar?
    - Is it an up-market high profile business?
      Or
    - Is it a commonly found business, that most suburbs have several of?
- What are you selling?
- Does your range offer an impulse purchase, e.g. the latest lipstick collection or a small counter display of a new niche skin or hair treatment?
- Is your strategy to wedge your way into a business or is your brand's sales approach to a present a full concept?

Each of these scenarios would lead me to offer you a different answer to your question of "What should I take in to a cold call?" Here are some general guidelines:

1. Less is best
2. A business card is a must

If you're selling something that's a possible fit for several businesses in the suburb and you perhaps have a small intro offer that could create an impulse sale… then I'd take that with me, as well as the supporting paperwork.

However, if you're at the other end of the scale and you're scouting the area for your next key account, and the outcome you're pursuing is an appointment with the business owner… I'd suggest you leave everything in the car. You only need to take with you two things:

1. A business card
2. If you run your diary on your phone, take your phone (turned to silent of course) or whatever other device or tool you need to make an appointment.

That's it. At this level, less is best

In a cold call on an upmarket business, you have 30-60 seconds to make an impression. As soon as you walk in, the receptionist or the person you see first will make an instant assessment:

- Who's this person?
- Are they here for an appointment?
- Or something else?
- Are they here to give or take?
- I hope they aren't selling something… that last experience with a sales rep was a bloody nightmare!

That brings me to step two – the Call Plan.

Your primary objective of formulating a Call Plan is to think through where you want to take it.
What do you want to achieve? Is it:

- An instant sale?
- Do you want to evaluate if they are interested in what you're selling?
- Is your goal to assess, not impress – to evaluate if they're a good fit for your Brand Avatar?
- Do you want to invite them to an event?
- What is it?

Here's the five steps to your Call Plan:

1. Prepare psychologically

Leave all your challenges and distractions in the car. Clear you mind and think about the client you're about to visit and focus on getting a positive reception and outcome.

2. Prepare mentally and physically

You should have already checked your materials during your pre-call planning stage and they're looking good.

3. Create a good vibe

Go in with a smile. Smiles are positive, and they can be contagious. When I'm training in-field with a rep I'll make a joke just before we go thru the door – that way, we're both laughing or at least smiling as we go through the door. The difference that small thing can make, is quite noticeable. Afterall, most people like and are attracted to positive and happy people.

4. Be positive and clear on how you're going to engage

On meeting the person at reception, offer a compliment or comment on something positive about their business, or how it's made your feel. Think about how you're going to engage them.

5. Have a clear purpose for you call

Business owners are busy – don't use the 'just thought I'd pop in' comment. Say who you are, (offer your business card), your company or brand statement and then early on, state the purpose of your visit.

The whole thing may go like this:
"Hi, I'm Neil Osborne"
(As I hand over my business card) "I'm from The Sales Catalyst"
"We're a specialised industry-based training company"
"The purpose of my visit today is…
(This is when you start to unpack your pre-planned conversation, which is normally one of two options):

1. A question-based approach

This approach can be highly effective at any level of business. However, it does depend on the types of questions you're asking and how you respond to the answers offered.

You need to listen with the intent to understand their situation, rather than with the intent to interrupt so you can deliver your next killer comment. Delivering killer comments doesn't always work with the larger clients – asking and listening does.

If well balanced, this style of conversation and engagement can open doors where in the past they've been closed to you and your brand. It's an approach that requires practice and confidence in the delivery.

2. The statement-based approach

I call it this the 'telling style' and it's the one that most salespeople use. If this is your approach, your goal should be to adjust your language to the level of business that you're talking to (e.g. a conversation with an up-market business around ideas just won't cut it…. a conversion around a new concept will).

The main challenge with this approach is that it's used by a lot of salespeople. Therefore, to be perceived as different, your goal is to show that you're not using the same bad habits that are used by unskilled salespeople. In being different, you'll avoid having their judgement of you and your brand being coloured by their previous bad experiences.

Regardless of which approach you use, you need to think about how you're conducting yourself – do you know what vibe you're giving off? Is it needy and pushy, or at the other end of the scale are you confident and attracting opportunities? Most salespeople go through the door with the goal of finding the owner or buyer, engaging them and 'selling' them. Those salespeople are easy to identify as they ask a leading question that sets them up big time, which is" May I speak with the owner?"

Hmm…Have you ever thought what the staff of most salons have been told to say or to do, when they're asked that question? Yep you got it. "Sorry, they aren't here at the moment." And then bang, up goes the brick wall and everything shuts down.

My goal is slightly different… It's to go through the door and conduct myself in a way where *they want to engage with me.* To achieve that, I conduct myself differently and NEVER ask "May I speak with the owner". (BTW there are many other ways you can ask that same question and make it easy for them to answer and avoid the brick wall going up.)

So, once you've navigated the brick wall, I suggest you start your '1st Layer Introductory Question-based Conversation.' That conversation then leads into your product or service, USP's and the connected business conversation.

Your goal at this stage, is to gain some level of progression – albeit a business appointment, a call back to meet the owner, or deliver an invitation with an agreed call-back plan. Once you've reached agreement, you politely confirm the next step, agree to a time frame and ensure that you're not over promising. Then depart.

The key with large accounts, is to under promise and over deliver.
Not the other way around.

That brings us to the final step, the Post-Call Plan.

While the previous two steps seemingly appear to be of the greatest importance, I'll suggest this is the step that can quickly undo the other two, if you're not careful.

Once you're at this point, the Post-Call Plan becomes vital:

1. STOP

2. Make notes

Find a place to start collecting and recording your thoughts – recall the conversation you just had and start taking some notes, be it written or in Evernote on your phone. It doesn't matter where or how you take notes, but you *must* write down their name and the key points from the conversation immediately, not later. And most definitely not when you get home.

3. Make it happen

What do you have to do to make it happen? Whatever you agreed to in the conversation, you must make it happen by the time/day/date you agreed to. Be very clear about what you must do. Large clients want to work with people they can trust. That trust takes time to build, and it takes doing things that you said you were going to do, by when you said you were going to do them. The quickest way to undo all the good you've created, is to forget to do something.

OK, we've covered a lot in this episode, so let's sum up:

- There's a 3-step process to doing highly productive calls, especially a Cold Call.
- The steps are:
  1. The Pre-Call Plan – the steps you take prior to the call
  2. The Call Plan – how you're planning for the call to play out
  3. The Post-Call Plan – what you need to do after completing the call

The Pre-Call Plan

1. Clarify your Brand Avatar
2. Consult your territory plan
3. Target the type of client

4. Who's the client – research them
5. Check your materials – no dog-eared materials and less is best, a business card is a must

The Call Plan

1. Prepare psychologically
2. Prepare mentally and physically
3. Create a good vibe
4. Be positive and clear on how you're going to engage
5. Have a clear purpose for your call
6. The first layer introductory conversation:
   a. A question-based approach
   b. A statement-based approach
   c. Avoid "May I speak with the owner"
7. Reach an agreement that you can deliver on

The Post-Call Plan

1. STOP
2. Make notes
3. Make it happen – to build trust, say what you're going to do and do what you say

There's a lot in this episode to ponder and think through, to make it happen.
If you take the time to do that, I'm sure you'll enjoy some stella results.

Until next time… enjoy your day.