12 tips for getting appointments with new customers

Most of the sales staff I have worked with could use the telephone more effectively. I guarantee you there are hundreds of prospects on your territory who may never have heard from you and could quite easily have a need for your product or service. Alternatively they may have heard from you or your company a long time ago and it's time for a follow up call.

Here are a few simple tips:

1. Be perfectly clear in your mind what the purpose of your call is. In B2B selling most of the time the call is used to qualify if there would be some value in you either meeting with the prospect or alternatively sending something through to them. Do some homework prior to the call. Has anyone else in the company spoken to this prospect before? Check your CRM, Linked In, You Tube. A quick website visit, don't procrastinate.

2. Know what you will say when the gatekeeper or the prospect picks up the phone. Your first ten words are more important than the next 100. e.g.: "Could I speak to the person who looks after your NSW sales team" Try and listen closely to the gatekeepers name and use it during the call. E.g.: "Thanks Amanda for putting me through. I appreciate it".

3. Listen closely to the way the customer speaks. Notice their pace, their choice of words, their tonality. Get in to rhythm with them as quickly as you can. This is very important. We tend to like people who are like us.

4. Acknowledge the fact they are not sitting there waiting for your call. Chances are they have other priorities. I like to start with the following. "Hi Rita, I'm sure you're fairly busy, so I'll be brief." Note if they are not there don't leave a message. Listen closely to their voice mail.

5. Be prepared to set a time to make a follow up call. It's not your option A, but you might need to. Ask the prospect if it would be easier if you called them back at a more suitable time. You might confirm the call back time via email.

6. Always clarify you are speaking to the right person. This can be a challenge. A big trap for new players is spending far too much time speaking to the wrong people. The best way to find out if you are speaking to the right person is to ask them a direct question. E.g.: "Are you the person responsible for client entertainment?" They may lie to you, but it is important that you ask. If they are not the right person, ask them whom they would suggest you should speak to at their company.

7. Start your conversation, with the right person, by clarifying the reason for your call and asking them an interesting question. E.g. "The reason for my call today is to find out if you are interested in some creative ways of strengthening your customer relationships?"

8. Get permission to ask a few brief questions. E.g.: Is it OK if I ask you a few quick questions." How would you go about making a decision like this? Would there be a number of people involved? Do you have an existing relationship with another company? Would you ever consider other options? How often do you need to…? Questions are very powerful. I always suggest when starting out you have a few prepared.

9. The most important point. LISTEN, LISTEN. LISTEN, to everything they say. Take a few notes when they are talking. Probe. Tell me more, uh huh uh huh, wow, is that right, do go on, really. etc. All very useful. Give them back a mini summary of what they told you. E.g.: "so, what you're saying is you do attend some events from time to time but it's rather just on the spur of the moment than overly structured." Also, if you did attend an event ideally it would be in Melbourne and preferably the races or the football"

10. Always end the call with an agreed action. Either a qualified meeting, (Who else should join us at that meeting is a very useful question) agreement to send them something they would value or confirmation on a suitable time to call them back. I recommend a short email post the call confirming the agreements made. People have a habit of forgetting things.

11. In general keep the calls relatively brief. You are qualifying. Don't waste their time. Use their website to gather more data if need be post the call. I prefer shorter, sharper initial calls for most prospects.

12. Make lots of calls. You've probably heard it many times before. It's a numbers game. Get on a roll. Block the time out in your diary to make the calls and go hard. You might like to try 11 calls by 11am. Stand up, smile, and enjoy it. Track all the outcomes, update your data and make your call backs.

Here are a few final points. Always have access to your customers and prospects numbers in your mobile phone. You won't regret it. Make more calls than anyone else in the company. Have the highest mobile bill for 3 months in a row, based on customer calls and I'm confident you will be selling more than the other reps (all things being equal). Now, go on, as my first sales manager, Barrie Quick used to say, "come on Steve, hit the phones".

Tips

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