

A Checklist for Selling Over the Phone

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Do you personally use the telephone to close business? Do you supervise or manage people who sell over the phone? Whether it's to promote training classes, special service packages, renewal programs or add-ons to an existing deal, selling over the phone can be down right difficult. If you have ever wished you or your reps had a checklist of what to do or not do, look no further. The following pointers will increase the odds for being successful.

- 1. Understand your target and how that individual buys.** Before placing a call, you should know as much as you can about your target. Go to their website. Use your own internal CRM system for information. Put yourself into the mindset of your listener. Understand how that person usually makes buying decisions.
- 2. When the target answers, identify yourself and state the reason and benefit of your call in 15-20 seconds.** It goes without saying it is important to give your name and company's name. However, the hook for your target to listen further is a quick benefit statement. *"Hi Fred. This is Judy with ABC Corporation. I am calling about a new special service package that will allow your agents' unlimited technical support."* *"Mike, this is Mary from XRT Insurance Company. Your car insurance is up for renewal, and I am worried you could be unprotected."* *"Hi, I am Jacob with AML Technology. Your company has recently purchase C Storage. I wanted you and your engineering staff to have first shot at our next training session, October 1."* This is not the time for a full blown sales pitch. The goal in those first 15-20 seconds is to grab attention.
- 3. Ask permission to continue the discussion.** It's just plain good manners. A lot of inside sales reps assume because they have a 'live' person on the other end of the line that it is appropriate to launch into a product sell. People are busy, and you might be interrupt-

ing. By asking the individual if he/she has a few minutes to talk, you demonstrate respect. If the "hook" has been strong enough, people will listen. If the timing is not appropriate, the target will suggest a time for a call back. If the person is vague about when to call back, move on. Don't waste your time calling again. There are other targets open to what you have to say.

- 4. Use a Reference.** Did someone suggest you call? If so, be sure to mention it. *"Harry Flag stopped by our booth at the XXX Conference and suggested this training class would be very valuable to your radiology technicians"* *"Theresa Meta said we should call you since you are not satisfied with your current provider."*
- 5. Have a friendly voice.** It's your calling card. When you initiate a call, you should smile and sound upbeat. If you have previously come off a "bad" call and feel rejected, give yourself a few minutes to decompress. Get feedback on the tone of your voice. If your calls are taped, periodically review your calls and ask yourself, "Is this a voice a customer would want to hear?"
- 6. Avoid being scripted.** Some companies go to the trouble of providing a script for their inside sales reps. Even if this is the case, make sure you personalize the script so that it sounds like you. People just want you to have a conversation with them. When it seems like you have memorized a script, you are less likely to connect.
- 7. Clarify needs.** A doctor would never take a person into surgery without understanding their condition. The same approach should be true for you or your reps. Ask listeners what is important to them. Inquire about their situation. Make sure you have all of the details correct and that nothing has changed.

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8. Pitch your product or service in a listener-focused manner. Zig Ziglar, author and speaker, once said your listeners are tuned into radio channel, WIIFM—What’s In It For Me. You need to be on that same channel because they will only buy if they see an advantage. Thus, every word that comes out of your mouth should be focused on how the service, add-on or training you are pitching will benefit them. Begin statements with “*What this means to you is...*” Or “*How this will help you is...*”

9. Be clear and concise. Your goal is to get the target to understand. State your case clearly. Don’t bury your thoughts. Make sure your sentences come to definite ends. Avoid overwhelming your listeners with too much detail. Pause often between points so that listeners have the opportunity to digest them.

10. Be prepared for objections. People who are Phone Pros anticipate objections and welcome them. They know how best to resolve them. They even practice stating their answers out loud so that they sound convincing. They are not caught off guard when customers ask, for example, why they should pay extra for training or for advanced services or why an increase in their renewal is justified.

11. Pay attention to buying cues. Inside people can over-talk a product. Usually, a customer will give you an indication that they are ready to buy. *Well, how much will this cost?* “*Can I get a discount if I send five of my engineers?*” “*Can you guarantee that our calls will get Priority One status?*”

12. Take “No” as an answer. There are times when the customer has decided the timing isn’t right or they aren’t interested. Take “no” as the answer and be gracious. They will remember your professionalism—or lack of it. Ultimately, if you have made a good impression, you leave the door open for future business.

Selling over the phone requires excellent phone skills. Make sure you or your reps take the time to review this checklist. Post it on your bulletin boards. The extra care and diligence you take with your customers will pay off in the long run.

Impact Communications, Inc. consults with individuals and businesses to improve their face-to-face and over the phone communication skills. When you have to have impact, phone (847) 438-4480 or visit our web site, www.ImpactCommunicationsInc.com.