Cold Calling Guide

pipedrive

5-step cold calling process

Step 1

Get their attention by using their name

Start off by saying

"Hi, ____,"

in a warm and welcoming tone. Then, proceed directly to Step 2.

Make sure not to say,

"Hi, ____, how are you today?"

because it gives your prospect a chance to jump in and disrupt your flow. Cold calls are all about taking control in the beginning.

Step 2

Identify yourself

"My name is ____ with ____."

This is pretty straightforward – you need to tell them who you are.

Step 3

Tell them why you're calling

"The reason I'm calling is to get some time on your calendar."

Diving right in demonstrates that you're a professional.

Save the small talk for your follow-up calls after you've already built the relationship.

5-step cold calling process

Step 4

Build a bridge

This statement connects the reason you're calling with why they should care.

"I just noticed on your site that you're [Explain the specific areas of your prospect's business that your product/service can improve]. Several companies in the [your prospect's industry or market] are already using [your key product or feature] to help [explain key benefit the prospect will be searching for]."

Step 5

Ask for what you want and shut up

"I thought the best place to start is to schedule a meeting to learn about your [insert specific challenges and goals]. Do you have time Wednesday or Thursday afternoon around 10 AM?"

Ultimately, our goal is to set meetings with prospects because we're calling on a more targeted list. However, if you're calling on a less qualified list, you may ask for a piece of information that qualifies the lead.

Advanced cold calling process

Step 1

Imagine one of your real friends is on the line

For salespeople, looking at a photo of a loved one while cold calling can improve performance. If you look at that photo while calling, you increase your close rate because you're thinking about another human being.

It's easy to reduce every person on the other end of the line to a faceless ATM just waiting to reject your card, especially when you're 50 deep into that day's call list. But tricking your brain into thinking you're on the phone with a loved one can help you relax and inspire a friendlier, more conversational tone. It reminds you that you're talking to another person with hopes, dreams and headaches of their own.

Step 2

Have some inside info

Only jump into a cold call with some background info on your prospect, or you might come across as clueless and entitled. Gather relevant info about the prospect, the company they work for and what their business may need. Remember that in sales, your first thought should be of the prospect: What do they want? What do they need?

Advanced cold calling process

Step 3

Qualify upfront

Qualifying your prospect upfront is efficient and respectful, as it saves you time while not wasting theirs. After you gather some inside info, use it to formulate a question with a somewhat obvious answer. Then, ask it within the first 10 seconds. If they say no, move on.

You might think, "If the prospects answer the question with a "no," shouldn't I still try to convince them to buy my product? I'm a salesperson, after all. I should sell!"

That is a rookie mistake. Bad salespeople try to convince other people to buy their stuff. Good salespeople try to find people that are already interested in buying their stuff. Not every prospect is worth pursuing, and not every sale is worth making. Your goal shouldn't be to create an interest out of nothing. It should be to find existing interest and nurture it.

Step 4

Find common ground by being yourself

Be honest and authentic, but try to develop rapport as you listen. If you can do that – if you can truly be yourself – the rest will follow. Because most of the people you're calling have been through this before, they're uniquely attuned to all things phony. This is the most human skill there is. It's the ability to have a conversation, to listen and share back and forth, back and forth.

Step 5

Determine the legitimacy of objections

You need to analyze objections before you tackle them. Examples like "We don't have the budget," "we're happy with our current provider," and "we don't have the time to make changes" – don't try to counter it until you determine if the prospect is being honest or if they're making an excuse to get off the phone. If it's actually about the budget, countering their objection can be a productive route. What about next quarter? Does the budget open up? Would it be worth doing a trial so that by the time it expires, you have the budget and are ready to go?

But if it's just an excuse, it's time to move on.

Cold calling advice

Using this guide, **write down the most succinct version of each of these elements to come up with a unique script that suits you** and your conversation style. Have it in front of you when doing your calls.

To improve, **record audio of your part of the cold calls you make. Go back and listen to yourself.** See what worked and what didn't. What new lines or tweaks did you try out that were successful? Take all the lines that work and divide them into two lists. Use these to create **green light** and **yellow light** scripts.

- Lines that moved the call forward smoothly to scheduling a meeting
- Lines that won over a reluctant prospect

Your difference maker

Going into a cold call, your goal must be to stand out. Not necessarily compared to all other salespeople out there but for this prospect right here and right now. To make clear in a matter of seconds what makes you different.

Every cold call is a salesperson's elevator pitch. And what works in an elevator pitch? Something different. Something that stands out. Different captures people's attention. Different makes people curious. Different can shake up someone's day.

The good news – most of the time, it's the real you that makes you different, not a desperate attempt to be "like all these great salespeople."

There are two crucial elements to creating your difference-maker:

Personalize: Show why you ended up on the phone with this person specifically.
Emphasize: Focus on highlighting proven results for your service or product."

Cold calling advice

Making it personal

If you're lucky, you may have had a mutual acquaintance or contact introduce you to the prospect. But remember our cold calling definition: "A cold call is one that is made to a potential customer with whom you have no direct pre-existing relationship." So let's focus on that.

And remember: **If a prospect feels you're just going through a long list of phone numbers, you've lost before you've begun**. So it's crucial to do your research in advance and find out whatever you can about the individual.

If you call a company to find out who the right person is for you to reach, get that person's name and title and call back later.

Emphasize proven results

The chances are good that the prospect doesn't know about you or your company. **You need to make clear that you're not only legit, but have the results to prove it.**

You can do this by citing your work with other, similar businesses. And you can do it by playing up any and all positive publicity your company has earned.

""We've worked with more than 50 other companies about your size and increased their sales. I wanted to let you know about us." Or...

"Ever since there was an article about us in (the local paper), we've been working with lots of small businesses to increase their sales. I wanted to let you know about us."

Cold calling advice

Time check

By this point, you're about 10-20 seconds into your call. Before you do anything else, you need to make sure the prospect has time to speak with you. And this is where many salespeople make a big mistake – they take a prospect's answer literally.

"Do you have five minutes?" The prospect may say yes, but not really mean it. Usually, they're busy working on something and not able to focus on the call. **It's up to you to work out whether they're just being polite. If they are and you miss it, you're wasting your time and theirs by proceeding with the call.**

Distinguish yourself

View this time check as an opportunity to be different from other salespeople. **You can show the person on the other end of the call how much you respect their time and display confidence by not launching into a conversation that they don't want to have** right now. It actually shows you care, respect your time as much as theirs and that you're confident.

You may be skeptical of these lines. You may think that having the person on the phone is your best chance to hook them and that they won't answer when you call back. And the language may seem awfully forward. But they work.

"Who knows, we might be a really good fit at the end, but I don't want to take your time if you're busy. Do you have five minutes to speak now? If not, I'd rather call you back at a more convenient time." Or...

"I'd hate to waste your time. I also want to make sure we're not missing the chance to help you grow your business. If you have five minutes, I have two questions to help us figure out whether we should talk any further, really."

Cold calling advice

Does the prospect sounds distracted?

Go a step further:

When prospects hear that you're not just grabbing your first chance to launch into your script but truly only want to speak if they have the time, they're surprised or even intrigued. This, in turn, makes them curious about you and your work. Further, being sympathetic to their schedule and ensuring they know they are in control go a long way to establishing a relationship of trust.

"Are you in the middle of something that you would rather be in right now? Because if you are, I don't want to take your time right now. I want to catch you when you have five minutes. Should I call you back in 30 minutes or an hour?"

Analyze your prospect

If the prospect agrees to talk with you for a few minutes, it's now up to you to make sure that they are worth your time. You will not be able to help just anyone or any business. It's time to start discovering it.

Some of this is purely pragmatic and technical. You need to **confirm that this person makes the purchasing decisions about the kind of product or service you offer** – and, if not, whom you should speak with instead.

Cold calling advice

Check interest level

Even if you have reached the right person, there might simply be no chance that this prospect will take any interest. **Be specific. Ask a question about the prospect's real pain point.** Unfortunately, at this stage in a call, many salespeople instead ask something very general, such as: "Hey, do you want your business to grow?" and many feel that now is the time to launch the "this-is-what-we-do" demo-rocket. That just leads prospects to want to get off the phone.

But **when you focus on the specifics, you're more likely to get an honest answer.**

"Some people say: "I don't think there's a lot of room for improvement there – I think the problem is elsewhere." In that case, the prospect is probably not worth your time. But it is worth the time to just ask, "Where do you think the problem is?" and see how they define the boundaries of IT support.

But many people say: "Yes, there is room for improvement."

In that case, you move forward with the call, confident it is between two willing participants in a dialogue.

Cold calling advice

Listen to words and emotions

Now, it's time for you to listen to your prospect. Invite them to tell you as much as they wish about their needs and what kind of improvements they're looking to see.

The goal here is twofold:

1. Get as much information as possible to tailor your pitch for a near future meeting.

2. Build a rapport so they know you really care about their needs.
Make sure to stop before going too deep into areas better left to explore during a longer call or a meeting.

To accomplish this, you need to pay close attention to what the prospect is saying and what they're feeling. Listen to their inflections and tone of voice, the pace at which they talk and more.

Use your intuition. The more you do cold calls, the more you'll develop the ability to feel where the prospect is coming from. Hear the emotions behind their words. Are they stressed? Worried? Confused about how well part of the business runs?

"It sounds important. Is this something that you want to take a little bit more time to discuss, to learn how we could help address and hopefully fix this?"

If there's no emotion at all, you haven't quite hooked them yet. So try to get a sense of whether this issue feels important to them. Asking such a question gives the prospect time to think and decide just how important it is on their terms – and their answer should give you a sense of whether the conversation is worth pursuing.

As a prospect opens up, be sure to do relatively little talking yourself. When you do speak, be straightforward, honest and reassuring. Explain that you've worked with others who have these same challenges, and you've figured out some really good solutions."

Cold calling advice

Make it personal

Time for your moment of truth. Land that meeting. Make the next stage happen (and take a step closer to a potential sale).

The best way to reach the next stage is to simply **emphasize that it's the natural (or necessary) next step and will benefit you both.**

"We could talk more now, but here are a few specific things better suited to an in-person meeting."

Then list some of the topics you'd cover, and what you'd be able to show. You may get a yes. Or you may find that the prospect seems ambivalent. In either case, you can add:

"I wouldn't suggest it, though, if I didn't think it would be worth both of our time."

Tackle objections

A prospect may say: "Well, I want to think about it."

That's a common objection.

There's not nearly enough information exchanged to actually think about something. Can you imagine anyone hanging up the phone, putting on a thinking cap and ruminating on what you just discussed?

Even if they might, what if it's something you can answer? So never leave it there. Instead, try to get more information.

Sometimes, a prospect will say they're simply too busy to meet over the next couple of weeks. Again, be direct in response and ask to set a meeting time and date.

Cold calling advice

Manage skepticism

When you ask these kinds of questions, some prospects will acknowledge their skepticism. They may say: "I don't think it's worth spending time and money on this right now."

Respond to this by sharing your own perspective.
When they're unsure, you being convinced that it's worthwhile is often the key to securing a meeting.

And when you get to the close, the next step shows you how to handle it.

"Listen, being in this business for a while, I haven't seen anybody more skeptical than me. Of course we have to talk more about your concerns, but from experience, I've found that our product can add a lot of value to businesses like yours. You might decide it can't, but there's a good chance it can and it's worth exploring this potential."

Have a limited schedule

"If the prospect is willing to set up a meeting, don't make yourself available at any hour on any day – even if you are. **Tell them you have a packed day the next day and list a few specific hours you have available** the next day or even the following week. This shows that you're in demand.

But do find a time that works for you both soon – while the conversation is still fresh in your mind.

Once you've got a time set, get off the phone. It would be a waste of time to continue. Once the next stage is confirmed, it's time for both of you to move on to other tasks."

Cold calling scripts

Warm-up script

"Hi, ________.

My name is ________ from ________, hope you're doing well.

The reason I'm calling is that I noticed you were [insert relevant activity that your product/service can assist]. You're most likely [insert existing solution that is inferior to your product/service], and I wanted to let you know we offer ________ designed to get your current team more [insert key benefits to the customer].

It would be worth a 10-minute chat to see if we're a fit before you take your next interview.
We can even show you how you can [explain the most valuable or compelling feature and relate it to a benefit or solved problem your customers care about]."

Voicemail script

"Hello, ________. This is ________ from ________.

The reason for my call is I have an idea on how to possibly help you improve [insert very specific and relevant activity or problem that your product/service can assist]. I wanted to see if it would make sense for us to have a quick conversation to find out more about it.

I can be reached at _________.

Again, my name is ________ from ________.

Thanks, _________."

Cold calling scripts

Qualifying script

"Hi ________, this is ________ from ________. I hope you're having a decent day.

We're working on some solutions to help people like you [insert very specific and relevant activity or problem that your product/service can assist]. Is that something you'd like to hear more about?

(IF YES) Okay, great. This is how companies work with us. We can help them in a number of specific areas. [list your key offerings and how each will solve the prospect's specific problem]. Is there one of these areas you are focused on improving? Which one would you want to hear most about?

(PROSPECT CHOOSES ONE)

Super. Can I ask you a few questions first?

[Ask some key qualifying questions about their specific problems so you can give more relevant and targeted answers and examples.]

I'll tell you a bit more, and then if it makes sense, we'll set up an appointment before we get off our call today to go over it in more detail. Sound good?"

Example problem base call

Objection handling

For each step of your pitch, **think of every possible objection your prospect could throw at you – then prepare a rough answer, but make sure you listen and that your real-time answer makes sense** in the conversation!

It's crucial to cushion their objections first, e.g.:

"I'm not surprised to hear that – I think everyone is very used to putting up with these problems, but..."

Step 1

Introduce yourself and ask for their time

"Hi _____, it's ____ calling from _____ . We haven't actually spoken before, but I was hoping you might have two minutes for me to briefly introduce myself?"

Step 2

Thank you

Wonderful, thank you!

Step 3

Introduce the problem you're helping companies to solve

Pipedrive example: "Essentially, Pipedrive exists to help salespeople become unstoppable with a CRM that gets out of the way so they can focus on getting their sales activities high."

Example problem base call

Step 4

Engage with them about frustration #1

Pipedrive example: "How often do your team forget to follow up with leads because there's so much noise in their CRM?"

Step 5

Build on frustration #1

See if you can get them to agree that they struggle with these frustrations! If they do, how can they say no to you?

Pipedrive example: "Absolutely, it can be SUCH a waste of potential revenue."

Step 6

Engage with them about frustration #2

Continue seeing if you can get them to agree that they struggle with these frustrations...

Pipedrive example: "Do you find that you spend a lot of time switching between your email and CRM?"

Step 7

Build on frustration #2

Find out what further complications this initial frustration is causing them...

Pipedrive example: "If you didn't have to spend so much time switching between your CRM and email, what could you be doing instead?"

Example problem base call

Step 8

Engage with them about frustration #3

See if there are any other challenges they can relate to…

Pipedrive example: "Do you have to train new team members on using both tools, as well as syncing data between them?"

Step 9

Build on frustration #3

Get them to elaborate on their frustrations…

Pipedrive example: "How does that affect productivity and team morale?"

Step 10

The Close: Solve their problems by arranging a meeting/selling your product

Meeting: "I'd love to show you how [your product] solves these problems! Do you have some time next week, perhaps Thursday afternoon?"

Immediate sale: "Great, well XXX companies use [your product] to solve these problems – [your offer]."