

Robert: Hello, everyone. This is Robert Middleton of Action Plan Marketing, and this is the audio program on “The Art and Science of Telephone Follow-Up.” I am here with Denise Clancey of Teledirect Partners, who I’ll introduce in just a minute.

I decided to interview Denise for this program because the telephone follow-up is one of the most important parts of the marketing process. You might say it’s that pivotal point between marketing and the sales appointment.

If you get out there and market and network and give talks and generate leads, etc., ultimately to get to the sales appointment, you have to do telephone follow-up. If you don’t do that and you just wait around for people to call you, you’ll have less appointments, get less clients and make less money.

In this class, we’re going to get into the nitty gritty of what it takes to follow up by phone successfully, make more appointments and build your business.

Let me quickly introduce Denise. Denise has been in the telesales and customer service industry for 20-plus years. She works with small businesses and independent professionals to improve their ability to sell and service their customers via the telephone.

Denise started her company, Teledirect Partners, in 2003. Prior to starting her business she ran call centers for MCI, Lotus and IBM. In fact, with Lotus she established a successful small business sales organization that was responsible for bringing in \$32 million in new business in

its first full year of operation, 100% via telephone. Denise really knows what she's doing in terms of telephone follow-up.

Denise is a frequent speaker on the subject of teleselling skills and techniques and has published a number of articles on the subject.

Denise is the author of the upcoming book tentatively titled *Telephone Traction: 118 Tips for Telesales and Customer Service Managers*.

Welcome to the teleclass.

Denise: Thank you, Robert. It's good to be here.

Robert: You're welcome. I'm really excited about this because as I said, this is such an important thing. Tell me, what is the art and science of telephone follow-up as you think of it?

Denise: I like to think it's a combination of the value and enthusiasm that your voice and your personality bring to the call, combined with the systematic approach to actually making the calls.

You mentioned earlier that you do all of this marketing, you go to events, you do speaking engagements, and then you sit and wait for people for to call or contact you.

When you develop good telephone follow-up skills, you develop your art and the science and systematic approach, you should reach out to them after these events. You should follow up with a good number of the people that

you've met at these events, or members of the audience of presentations that you've made.

Robert: Absolutely. Again, you just can't wait around for this to happen. But people avoid making these calls, and we'll talk about this kind of thing. They don't know what to do, what to say and how to organize it. Therefore, it's not unusual that people procrastinate with this a lot, right?

Denise: Yes. It's interesting, too, because these same people use their phones all the time. In fact, the cell phone is becoming almost an extension of our ear some days. Yet when it comes to making calls about your business, many people hesitate.

Robert: Right.

Denise: I think it's because they haven't really sat down to think through what skills they need to develop and what process they need to put in place to do it well.

When I talk about the art, the art is your personality. It's your voice. It's your inflection. It's the vehicle for expressing your message. You need to think about what your voice communicates about you. You need to think about the pace of the call, the tone and the enthusiasm that you bring to the call, and you need to practice these things in order to project yourself well on the phone.

Of course, just having those things and being the best that you can be in expressing yourself over the telephone doesn't work if you don't pick up the phone.

Then you need to set up a process for the follow-up. An example would be if you're presenting to a group of people. Prior to even going to the event, you've developed your presentation. You've developed all the material you're going to give out. You're ready with your slideshow, if in fact you're doing a slideshow. You're ready with your stand-up routine.

Prior to even arriving at the event, you should think through, "Who might be there? What should I be doing as a follow-up to the event, to my presentation? Should I be offering something as part of my presentation, or should I be considering offering something in a follow-up?"

Of course, you could do that by email, but a certain subset of the people you meet at the presentation, you should actually pick up the phone and give them a call. It's an ideal time. They've heard you present. They were interested in your topic.

Typically in these kinds of presentations, you might have met a few of them face to face. You have some notes about them on the back of their business cards. You should develop an approach you're going to take and actually pick up the phone within a day or two of having presented.

Robert:

I don't know if this is the right time to ask this, Denise, but I think a lot of people get stuck in this because they go, "Well, if they didn't follow up with me, that means they weren't interested." Is that true?

Denise: I don't ever believe that's true. I think that there is some group of people that, if they didn't follow up with you, they're not interested. But just as you return from your presentation to your office and get caught up in things, I think people return to their office. Even though they were interested, particularly the ones that were interested enough to approach you personally might be interested.

Robert: Absolutely.

Denise: But they just don't go through the trouble. I would also say that if I'm approaching a speaker at an event and I express interest, I would hope that speaker would have some sort of systematic way of reaching out to me to ask me if I continue to be interested.

Robert: That's right. We forget that if we get a good follow-up call like this from someone, we're actually pleased to get it. They are spending time and attention on us. We like that.

We often build up these beliefs and ideas that following up with calls like this is just a bother or an intrusion, and it just isn't true. That doesn't mean you call every single person you ever meet.

That's sort of the foundation of this. It's being prepared. It's knowing that you should call. It's making the calls. What's the basic preparation for this? What's more of the foundation that we need to know?

Denise: The basic foundation for any good, systematic way of approaching a call is to know what you're going to say and develop a simple call guide with your message in the call.

You should also understand that as a part of that conversation, and it is a conversation with the person on the other end of the phone, they might in fact have some questions. You should be prepared not only to express your message, but also to handle questions.

Those range from very common questions or statements like, “I don’t have time right now, but I am interested. Please call me at another time,” or “I’m not interested. I don’t have the money right now,” to something more complex like, “How does your service help me specifically? How does your service do _____? What does your company bring to the table that I might need?” You should be prepared for that.

Robert:

I think we’re going to get into more details about scripts later on, but I remember, Denise, the early days of me starting my business and making follow-up calls.

I really prepared and I wrote out my scripts. I often wrote it out, then I typed it out, then I practiced it out loud. It wasn’t anything really complex. It was just so I didn’t get tongue-tied. You’re often a little bit nervous making these calls.

The more you’re prepared ahead of time, you know what you’re going to say, “Hi. This is Robert Middleton from Action Plan Marketing. You attended my talk last night and I just wanted to follow up with you. First of all, I wanted to know, how did you like the talk? Did you get some good ideas?” or something like that.

You've written that out and you've practiced it, and it's going to feel natural instead of fumbling around incoherently. It's like you pick up the phone and your mind goes AWOL.

Again, we'll get more into some of the specific scripts later.

Denise: I want to make a point on that, too. Robert, when you wrote out scripts and then practiced them, you actually took it to a level that most people don't do. Nine times out of 10 if you say to somebody, "You should write a call guide. You should write a script," they'll go through the trouble of doing that. They may even practice, but a lot of times they practice by reading it rather than speaking it aloud.

Robert: Right.

Denise: I recommend doing a number of different things. I recommend, certainly, reading it to yourself. I recommend standing in front of a mirror, because it's really surprising the difference in the tone of your voice if you practice in front of a mirror. As you're reading the script, you catch your image in the mirror and you lighten up a bit or you start smiling at yourself. Something comes through.

Robert: You see yourself in the mirror, how glum and morose you look, and you realize that's coming out in your voice so that cracks you up a bit. I mean, seriously, it happens.

You could tape record yourself. I used to do that quite a bit. You can hear the tone. “Do I sound like someone I would like to hear from or not?” That really makes a big difference.

Denise: Yes, and it’s amazing even without going into all the details about whether or not you can tape both sides of the conversation or whatnot. Tape yourself on a call, a live call or a practice call. Tape just you, just your side of the call. It’s amazing what you’ll hear in terms of tone and voice and the words that you use, and all of that can be used to improve the next call.

Robert: Yes. It can be a bit brutal, but it’s worth doing.

Denise: That’s true. I recommend also putting a small mirror in front of your phone or by your computer, wherever you’re making your calls, because if you catch yourself in the mirror, chances are you’ll smile. And a smile does come through the call.

Robert: That’s right. Your expression shows in your tone of voice.

Denise: Right, which is also why you should sit up, perhaps even stand. If you’re accustomed to gesturing as you talk, I highly recommend standing up and gesturing. However you can bring your personality into the call, you should.

Robert: Okay, good. Can we go back to this other piece? I think I want to get into a little more of who and why you called. We talked about the why. If you don’t call, they’re not going to call you. It’s a thing that keeps the sales process going.

Let's just brainstorm a bunch of different scenarios why you would call somebody. What are various scenarios for follow-up calls?

Denise:

I have my database, my list. It's a list of names clustered into a couple of smaller lists. I would call people just to touch base. "I haven't spoken to you in a while. I just wanted to say hello and wondered how your business was going."

As part of my notes, I take down some notes from our last conversation. "Robert, I wondered about your vacation. The last time we spoke, you were preparing for vacation." It's touching base.

You can call people because you have a piece of information or something of interest to them.

Many of us think nothing of sending an email. "I saw this article on this website and I thought you would be interested." You do the same thing on a telephone call. "I saw this article. I thought you would be interested. I just wanted to touch base. Here was the interesting piece to the article." Naturally, you also end up sending that to them, but it's a way of getting yourself connected to them personally.

Robert:

I want to add a bit to this because I can't tell you, Denise, how many people I have talked to that have done that. They get into a conversation and then the person says, "Hey, we're working with this. Do you think you could help us with that?"

It's happened more times than I can tell you, and it's very different than making calls saying, "Hi, this is Robert Middleton, just touching in. Do you have any work for me right now?"

Denise: Right. That's true and that is of course the next level of calls you could do. You could classify and delineate your list into suspects, people you're interested in speaking with. They may not know you, but you would be interested in chatting with them and getting to know them and their business.

Robert: We'll talk about some scripts for those people later on. Shall we?

Denise: That would be great.

Robert: That would be more the cold call.

I created a new way to think about cold calls. Don't think of them as cold calls. Think of them as introductory calls. If you can call someone to introduce yourself, you're not selling them that second, but just introducing yourself can actually be quite effective and not result in a lot of rejection if you know how to do it.

What are some other scenarios?

Denise: Then there's the more classic. You've got prospects and customers on your list. You need to have an approach for each of those.

To your earlier example, Robert, there are people that you've spoken with that don't have need of your service today. But if you were to stay in touch with them through various marketing methods as well as picking up the phone every once in a while, six months from now, nine months from now or a year from now, they're happy to hear from you.

You introduce yourself. You say, "I'm just touching base. We last spoke about," whatever we last spoke about. They say, "Well, now that I have you on the phone, we are going down this path," or "You did mention, Denise, that you improve telephone skills. I have a number of issues around that and I'd love to explore that further with you."

Robert:

Before you know it, you're discovering so many reasons to reach out to people.

I remember early in my career, I created a new workshop. I had a list of people that had been to programs or I had worked with one on one. I don't know how many people. It was 24 or 30 people, something like that. I called them all up and said, "Hey, I'm doing this new program. This is what it's about. I think you might be interested. I want to invite you in and talk to you about it."

Most of them said yes, and most of them signed up. That isn't going to happen just sitting around twiddling your thumbs. People are not going to say, "Hey, do you have this kind of program, and can I sign up?" It is not going to happen. It's being proactive.

You can actually do real campaigns around just following up and setting up those times to talk about something, especially if it's a more expensive, more complex service. You know, "I've been thinking of you. I've developed this thing. I have this new thing," etc.

There are so many different ways and then there's just the basic follow-up through your marketing, right?

Denise:

Yes. There's the basic, particularly to the prospects when you know that need to advance. Even with the customers you want to sell additional services to or you think would be interested in additional services, there's a way of advancing the prospect and the customer through your marketing plan that allows you to call them and advance them to the next step by setting up an appointment to see them.

You also might call and find that they're interested in something, send them more information, and then say you'll call them in a couple of weeks to follow up on it. There's a way of advancing them.

Robert:

One of my favorite ways that I did for years, and I got a ton of business this way, is I did talks. You were talking about that a bit earlier, but you do a talk and then you offer a complimentary follow-up session.

I actually did a similar thing with one of my marketing coaches. She was at a seminar and she offered a complimentary marketing strategy session. The regular fee for that is \$295, but if you wanted to sign up for that day, she'd do it. Essentially that marketing strategy

session was a sales call. It was an opportunity to find out about their needs, their challenges, where they wanted to go, what you could do with them.

She got 11 people at that group to sign up and seven turned into clients. That was all through presenting an opportunity to have a conversation. Having a conversation with you can actually give someone value. It's not wasting their time. It helps make them clearer about their direction, etc.

Denise: In that case, Robert, did all of the people come forward and say, "I'd be interested," at the event?

Robert: Out of 30, 11 people took her up on it.

Denise: I have to say, putting my telephone hat on, that I wonder if there wasn't another group of people out of the 30 who would have responded if there was a phone call placed after the fact. "You attended my session. I know you didn't sign up, and that's perfectly fine. I just wanted to check in with you." You add some of the similar questions you said at the beginning.

Robert: That's right.

Denise: "What did you think of it? You must have been there for a reason. What was the particular reason that drove you to sign up for the session to begin with? Oh, by the way, I wanted to let you know that although there was an offer on the table at the event, I did want to extend that offer to you for the next week. I'm interested to know if you'd like to take me up on that."

Robert: I'll bet you a buck, the other 15 people, half of them or more, might take her up on this.

Denise: I'll bet some percentage would. and I'm sure that it would more than pay for itself.

Robert: It's how you think about it. That's how you think about it. You don't know if some will accept an invitation unless you extend the darn invitation.

We're all sort of waiting around hoping that people will ask us, but that is not their job. It's our job to invite them. It's not our job yet to sell them. You have to sort of have permission to start selling. You've been at a talk. They've spent three hours with you and they have a good connection with you. They will take your call.

One of the most powerful ways to take it to the next level is giving these presentations and doing this kind of thing. Then, of course, there's networking. You go to a networking event, you meet people and you get cards.

I can't tell you how many events that I have been to, Denise, where people have gotten my card and said, "Yes, call me about that. I'm interested." Did I hear from them? No.

Denise: You probably didn't even get an email, did you?

Robert: No. This is another place to get a lot of leads to follow up on. You do a tabletop expo at a Chamber of Commerce or

a professional group. People come, they go around, you talk to them, and they give you their card.

I did that at a group a few months back and I gave maybe 20 cards away. Only one followed up. There's a lot of opportunity out there that people are not taking advantage of. Only one person, and not only that, it was a terrible follow-up call. I said, "Now is not a good time to talk, but could we talk tomorrow at 3:00? That would be fine," and he didn't follow up.

Denise: That's a cardinal sin.

Robert: I'll bet a few people that are listening to this are nodding their heads going, "Yes, I've been there. I haven't followed up. I've forgotten, too."

It's not forgotten. Often, we're afraid. We're worried about rejection. We make up all this stuff in our head about it. I'll tell you, if you don't make those follow-up calls, huge opportunities can be lost.

Denise: Right. To your point earlier about selling, every call is not a sales call. It's part of the marketing and sales mix. The intent of every call is to advance the relationship.

Robert: Yes, exactly.

Denise: That's the intent that I make for every call. I intend to advance the relationship. Now, I could be advancing the relationship from an unknown person to slightly more known. I could be advancing the relationship from having presented to a deeper understanding of their interest.

Every conversation, whether it is email or telephone call, and in my case 90% of my correspondence is telephone, is an opportunity to advance the relationship. That's how we need to think about these things.

I think where people get stuck is when they think, "I really need to know how to sell. I need to know how to close. I need all the skills that a really sharp salesperson has." That's not true at all.

Robert: Often what people want if they're showing some interest is they want to know that you're real, that you're credible, that you're interested and that you have valuable information, which is something you can forward such as articles or pages on your website. That's the whole marketing process, isn't it?

It gets to the point where it's, "Yes, I think I'd really like to see how this would help me," or "Could you tell me more how that would work?" Then you start to transition more into the selling conversation.

Denise: The single most important thing that you bring to the phone call is your enthusiasm for the work that you do. If you harness that and you harness the enthusiasm, you can get through a phone call that advances the relationship.

Robert: So true. It's how you come across just as much as, and sometimes more than what you say because enthusiasm is contagious.

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Let's get more into some of the specifics of the conversation. What do you say in different situations? How do you create scripts? What are some of the nuts and bolts of this? I think we'll spend a good bit of time on this, and we might even do some mini role-plays on this.

Denise: **I always say that you should have four different types of scripts.** When I say scripts, I'm talking about guides that allow you to move from one place in the conversation to the next. I'm not talking about something that has an awful lot of detail, just a guide or map that moves you from Point A to Point B.

1. Voicemail Script

Of the four scripts that I say you should start at all times, and you should have available to you, there is one that nobody ever thinks about. That is, what do you say when you get voicemail?

Some statistics will tell you that you get voicemail between 75% and 80% of the time these days. That seems a little high to me, but I wouldn't be surprised in the small business market if it wasn't that high.

You need a very succinct script. You need a script that allows you to present yourself and your company in a meaningful way, but in a very short way. Then identify what the next steps might be.

Robert: Of course, it depends where you are in the process. For instance, if I'm following up from someone that I met at networking versus someone who attended a workshop

versus a past client that I want to introduce a new service to.

You have to have your specific voicemail script for that particular situation, right?

Denise: Right.

Robert: So you're really talking more than four scripts, but four kinds of scripts.

Denise: Yes, four general categories. Even for the examples you just presented, if you met someone and you actually did have a conversation, hopefully you remember something from the conversation and jotted a little note. I say you should do this with every phone call. Jot something down. That can become part of the script. That can be part of the conversation. If you don't actually catch somebody live, it becomes part of the voicemail.

Sample Voicemail Message

"We met at the networking event last night. You mentioned that you were sorely remiss in making telephone calls and wanted a recommendation as to who could do that for you. I'm calling you today to discuss your needs, to talk about your business and to see if I can't match you with a company that meets your needs." That would be an example of something I would say about networking.

Hopefully I've jotted down something as the person's there or as they're leaving that allows me to be a little bit

more personal on the voicemail message than, "Hi, I'm Denise Clancey calling from Teledirect Partners. We met last night and I wanted to follow up." That's a little too boring for me.

Robert: Yes. What's the whole thing behind it?

The follow-up to the workshop, introductory program or talk could be, "Hi, this is Robert Middleton. You attended my talk on Marketing Tips for Entrepreneurs last night. I hope you got some great ideas. It was nice talking to you afterward when you came up. I just wanted to get back to you, and I'd love to chat with you about a few additional ideas that we talked about that could help you get some clients faster."

Something like that, right? How did I do?

Denise: You did really well. That was great.

Robert: I've done this a bit as well.

Denise: Good job.

Robert: Here's one of the big questions. How do you end this? Do you leave the ball in their court or do you say you'll call again? Do you just leave a number? If they don't call back, what do you do?

Denise: I think it really depends on what your purpose of the call was. In my case, I just recently presented to a group of about 50 people on developing their telephone techniques.

Out of the 50 people, I'm going to say there were probably 50% that I've no interest in necessarily talking to again. I was interested in having them there, but no interest in following up. Fifty percent were people that I really want to speak with, of which probably another 25% are people I want to target. I actually segmented my list. My goal was to follow up with everybody.

The people that I wanted to follow up with, but I had no real interest in hearing back from them in any particular manner, I called and said, "I'm just calling to follow up. Thank you for coming to my event and hearing my presentation. I wanted to let you know that I will be sending you an article on XYZ and wanted to wish you well in your quest to develop your telephone skills," and sent them an article.

I didn't leave it open that they should call me back. I didn't leave it open that I would call them back. For everybody else, I did.

Robert: Yet you never know where something like that will lead, because they could get the article and hand it to someone else. You absolutely can never know, but at least you've connected and something could happen.

That doesn't take you very long to do, 30 seconds for the call and a minute or two to send the email with the attachment.

Denise: Right. If you've got it all cued up, it becomes very systematized.

For the half of the audience that I really did want to follow up with, I never leave it to them to call me. Personally, when I leave a message, I always say, "It's Denise Clancey. I'm calling about the following. Sorry I didn't reach you today, but I'll plan to call you next week" if it's something general and I'd like to speak with them, but it's not significant that I speak with them right away.

Sometimes, if I want to speak with them right away or get in touch, I will say, "I will call you Monday at 9:00. I will call you Tuesday at 4:00." I try to imply an appointment in my call.

Robert: You put that on your calendar and call them then.

Denise: My script for that call is, "Hello, Robert. Denise Clancey again," and I give my phone number. "As I indicated last week, I said I would call you today at 4:00 to talk about," and I repeat the reason for the call. "I'm sorry I missed you today. Perhaps we can touch base another time. I'll try you again."

I don't do that too many times. Many times when you leave a message and say that you'll call at a particular time, you'll get one of two things that happen. Either the person will call you back and say, "I'm sorry, I'm not available on Tuesday at 4:00. Could we make another appointment?" or you might even get the person there waiting for your call.

Minimally, if you touch base with that person, a lot of times they'll say, "I'm sorry I missed you. It wasn't a good

time for me." It becomes part of a conversation, part of extending the relationship. "Sorry I missed your call. Can we make it another time?"

Robert: Also, you've come across as a professional that stays in touch and keeps their word.

Not enough people do that these days, so you stand out if you do that. As I said, a lot of people don't follow up at all. If you're the one that does, the one out of 20 or whatever it is, you're going to stand out.

Denise: Yes.

Robert: So that's the voicemail call. Again, you don't leave it in their court. You say, "I will call at this time," or you follow up a number of times.

Before we finish this, how many times do you call before you give up? I suppose it depends to some degree on how qualified or how much potential there is in this follow-up.

Denise: You're right, it really does depend. I can call someone as much as a dozen times over an extended period of time. I don't necessarily leave a dozen voicemails. If I'm not reaching someone and I have their email, I will use email and other ways of communicating to supplement the phone calls.

I've been known to, over the course of a year, call someone a dozen times. If the person was expressing interest, particularly if they were expressing real interest, and I've called them a number of times, left a couple of

messages and never heard back, I will get to the point where I'll do what I call the "takeaway."

I'll leave one final message before I go on hiatus. I'll say, "I've left you a couple messages. You did express interest at the BNI networking event that you wanted to follow up. I haven't heard from you, so I don't want to be a pest. I'll just leave you this one message and hope to hear from you. If not, I'll put you in my file to call you six months to a year from now."

Robert: Then you leave your phone number.

Denise: Of course.

Robert: I've heard people that do that and they get a call the next day. It's like the person will keep calling you and then they say they won't anymore, and then the follow-up call comes. Or it doesn't, but if they do call it shows they're qualified.

You mentioned email. The other thing that I'll do is if you can't reach them a couple of times and you have the email, send an email, "I tried to reach you a couple times and wasn't able to reach you. I'd love the chance to talk to you about ABC, XYZ," or whatever it is, then say a few times that you're available. I usually give three specific times in the next week. "Can you please get back to me and let me know which of those times might work? Then I'll call you. Sincerely..."

A good percentage of those people will say, "Oh sorry, I've been so busy. Eleven o'clock on Tuesday would work fine. I'd love to hear from you."

You just have to realize that people are busy answering hundreds of emails and calls. If you slip through the cracks, it's your fault. It's not their fault; you can't blame them. That's not how you play the game. You're the one responsible.

Denise: There's also old-fashioned snail mail. If you've called them and you haven't gotten a response, and say you don't have an email address, nine out of 10 times you can find a business address on somebody if you at least know where they work.

You can drop a personal note in the mail. That also provokes people to call you, if you put your business card in there. There's lots of ways.

Robert: That can be very powerful because they don't get a lot of those things, either.

Denise: Nobody knows how to write anymore, either. Most people can't decipher handwriting, so it's kind of a unique experience to get a personal note.

Robert: Okay, so that's the one major script. It's an important one because you'll be using it a lot. As Denise says, it can be 75% or 80% of the time your call you won't reach someone. You have to have that persistence and those many different ways that you can follow up.

What's the next script? You actually reach somebody.

Denise: That is novel, isn't it?

2. Reaching the Target Script

Robert: As I said to you before when we were preparing, sometimes people call and reach me. They're surprised and don't know what to say because they're actually prepared to give an email message.

Denise: Yes. If you're like me and block out your time, you make your calls on certain days or when you're in a certain mood, in the zone, you call and call and all of a sudden you get a human, you're tongue-tied.

You have to be prepared for this next script, which is what do you say when you actually get the target on the phone. The person you most wanted to speak with actually picks up their phone.

With gatekeepers and everything else, it is still amazing how many people will actually pick up their phone even if they have all of the assistants surrounding them.

Robert: It's true. I pick up my phone all the time. I answer my phone all day long. I don't like returning messages so if I can answer it, I do.

Denise: Yes, so you do have to be prepared for that. Sometimes that can catch you off guard so you need that script readily available, right there at your fingertips. What would that look like?

First of all, you would have done a little bit of homework on this target. If in fact this person is a target for whatever reason, you're advancing the conversation, you've just met the person and you want to follow-up, whatever the reason, you should know why you're calling. You need to have prepared that in advance.

The way you do that is, as we described, around events. Also, what I do when I'm calling someone out of my database is I look back over my notes from my last call. I like to jot notes as I'm talking. I'm sitting here with a headset, a pen and a piece of paper. I am jotting notes as I'm talking to people and I drop those notes into their file.

I go back to those notes and look for a couple things. I look for what we discussed from a business point of view, most specifically about their business needs, not mine. Then I also look for something personal. Did I write anything down that was personal that I could bring up?

What I learned early on in the selling process, way back when I first started calling for MCI, my very first sale was because I had jotted down when I called this guy and he said it wasn't a good time to talk, his dog had just died. He was very upset. About three months later, I called him back to sell him the same thing. I gave him the date of the last time we spoke and I said, "I apologize that day for interfering in your situation because your dog had just died."

He bought my product right there because he was so impressed by the fact that I had remembered something personal about him.

Back then, there was no such thing as CRM systems and software and whatnot. I didn't want to tell him it was on my little three-by-five card that his dog had just died, and I even might have written the dog's name. I gave it enough time and placed the call again.

Robert: That kind of thing, some people will say is manipulative, but it really isn't. It's that yes, I want to do business with this person, but I want to have a relationship with this person. I want to connect with this person. That makes it so much more fun doing business because you're dealing with real people. It's not some number.

Denise: Right. The opposite of that, Robert, how many calls have you gotten where you answer the phone and the person just launches into their pitch? You didn't even have to answer the phone. All they had to hear was that there was some breathing person on the line, right?

Robert: Right.

Denise: I have to say, I wasn't even old enough to be manipulative at that time, so I don't recall being manipulative. What I remember about that was, "This is something important. I shouldn't call him back right away. I should give it enough time, and it's important to say that about the last time we spoke."

He could have said, "Over and done with. Don't want to talk about it," but he actually was relatively enamored by the fact that I remembered his personal situation. These are about building relationships, and you can build relationships using the telephone.

Robert: No question, you can. I do almost all of my business by telephone. I never meet. I have people that have paid me \$10,000 that I've never met and I will never meet, or maybe I'll meet them once. You get the idea.

Denise: Yes. That's why when you and I met that one time, I heard a voice in the back of the room and I knew it was you. I had never met you, but I had a picture of you in my mind and I heard your voice.

Robert: It's like, "I've heard that guy on an audio program," or whatever.

Denise: Or on an audio program. "Where do I know that voice from? Oh my gosh, it's Robert Middleton!"

Robert: That's great.

Denise: The voice speaks volumes. Your enthusiasm speaks volumes, but you could also establish relationship.

Robert: I'd like to bring up a couple of points for you to comment on. Sometimes you're calling someone that you don't know much about, but they're a good potential prospect for whatever reason. I don't know if you're going to talk about the importance of doing a little bit of research on that person. You're going to sell them or offer them or

introduce something and do a little bit of research. Often, just a little bit goes a long way.

For instance, I've said if people would look at my website, read the home page and really get a sense of what I do before they call, that would go a long way to opening the door for a conversation with me.

If they said, "Hi, Mr. Middleton. This is so-and-so. I was looking at your website. I thought it was very interesting that you focus primarily on independent professionals. It looks like you sell a number of products online and do the certification program. I want to touch base with you because of," whatever the reason that ties into that.

If someone does that, they have my undivided attention. Why? Because I'm very proud of my website and it really shows that they cared enough to take a minute to look at it. Make sense?

Denise: It makes perfect sense. The Internet has made that part of the sales call, the telephone call, so much easier.

Robert: But how many people really do that? This is the kind of call you more typically get, "Hi, Mr. Middleton. I saw your website and I was just following up. What is it you do?" Then you've lost me because it's like, "Okay, well why didn't you take one extra minute and actually read what was on the website?"

People are often so fast to connect and they forget the whole relationship and really giving a damn. It seems so simple when you think of it, but so few people do it. When

you know something about somebody and you call them, it really makes a difference. It makes you stand out.

Denise: You can do that whether they have a website or you can do that by Googling them. You can do that by researching their industry. There are multiple ways of going about it that make it attractive to the person you're calling, that make it real for the person, as well as make it seem like you have an interest in them rather than just advancing your cause.

It opens up the conversation as well. Even if I picked out the wrong thing to start having a conversation about, the fact that I went to your website and did some work allows me to then move from one part of the conversation to another part, segue to another part simply by having done some homework. It doesn't take that much effort.

Robert: You could do this kind of thing at a networking event or after a speaking engagement. You get the card. These days a large percentage of people, if they have a website, will have that on their business card. That two or three minutes that you take to look at their site will really warm up that call.

Denise: And a decent amount have blogs. More and more have blogs. More and more can be found in Google because they do volunteer work or they've written articles, whatever the reason is.

In the case of an event, if you've met somebody at event, you could research the person. You could research their company. You could research their industry. You should

also know a little bit about the event and the organization that sponsored the event so you can have a conversation about that.

There are a lot of ways to build a conversation.

Sample “Reaching the Target” Conversation

Robert: Could you just give me a little sample conversation? Say I’ve met you at a networking event. I gave my card and said, “I’d like to know more about telesales. I’d like to improve my skills in this area.” Maybe I’m a bigger company that needs this kind of service.

Say you look at the website and you find out a bit more. What could be a typical, sort of initial thing that you would say just to get the call going? Not to put you on the spot or anything!

Denise: I’m working through it. As you were talking, I was writing notes, which is my typical M.O. Let’s walk through this. I call you.

Hello, Robert. This is Denise Clancey from Teledirect Partners. We met last night at the networking event.

Robert: Oh, right.

Denise: You and I had a quick conversation at the end of the event where we were exchanging cards and a little bit of information.

Robert: Right.

Denise: So I thought I'd pick up the phone today and give you a buzz to extend that conversation and to keep the connection going, just to see what your interest is and to see if there's something I could help you with.

Robert: Okay, great.

Denise: Last night at the event, you said that you wanted to know more about doing business by phone, about selling on the telephone and developing those techniques. I'm interested to know what you do in that space now. Do you actually pick up the phone and call people? Are you selling yourself?

Robert: We generate a lot of our business from the Internet. I have a number of people that do follow-up phone calls but nobody's very good at it. We use it as part of our marketing tools, but the things that I overhear people say make my skin crawl. I'm looking at getting some help with that. Is that something that you do?

Denise: Let me just make sure that I'm clear. When you said last night you wanted to know more about it, were you thinking about knowing more about it for you, for the people on your team, or both?

Robert: Mostly for the people on my team. We do various marketing activities and we have to follow up on that. Is that the kind of thing that you can help me with?

Denise: Yes. The people on your team, are they co-resident with you or do you have a virtual team or some combination?

Robert: We have four people here in the office that are making calls all the time. They're doing customer service, they're doing various things, but they're following up to present our services. I've given them some outlines. We've done some work on this, but I think it's just really falling short.

Denise: Well, that is actually one of the services that we do provide. We work with small companies and independent professionals to help them develop their skills.

In the case of your company, I could offer to look at a couple of things. If you wanted to continue to do it using the people that you currently have, meaning you want it in-house and want to develop their skills...

Robert: I think I do.

Denise: Okay. There is group of offerings that I could suggest to you. One is to look at the process and the scripts, all of what I call the "operational" pieces. Who are you calling? Why are you calling? What's the message you're delivering? How is it placed in your marketing continuum for its best advantage?

The second piece that I also can offer in this situation is actually working one-on-one or one-to-many in the group setting to develop people skills to take them to another level.

Robert: That's definitely something I think we need.

Denise: That can be done. If you wanted me to work with the small group, I could do it all at once if they happen to be resident in the office over some period of time during the week. We could do it all at once at your office, or I could actually work one-on-one with people over the telephone if people are more dispersed that that.

Those are some of the things that I do. From there, if you were interested in pursuing it, you could go from basic skills like getting organized to more advanced work or actually selling, closing deals over the phone, if that's of interest to you further down the line.

Robert: Wow! So how do I find out more about all of this?

Denise: Well, that's a good question. There's a couple of things we could do. I could direct you to a couple of places on the website that clearly spell out all of this work. Depending on how you want this done, I could also send you some information either electronically or

Robert: Web and PDF is fine.

Denise: Okay. I can send you some information that spells out what I offer to small businesses and what I offer to independent professionals.

It is a Chinese menu kind of setup where you can pick and choose. There are some things that are deliberately connected together so you can't disconnect them, and I do point that out. There are some prerequisites for certain things. For the most part, it is Chinese menu style. You

can pick one from Column A and one from Column B, depending on where you think your need is.

Once I send this to you, if it feels like you can't get to the bottom of it, I actually do have a very simple assessment tool that I can send to members of your team. If they want to fill it out, I can actually make some suggestions for you.

Robert: Okay, great.

Denise: I do work with companies of your size. I do exactly what we described. If you're interested, the next step would be for me to package something up and deliver it to you. Once you see it, should you be interested in doing the assessment process, which is a complimentary process, I'd be happy to that as well. Then we can talk about what the next steps would be.

Robert: Okay, terrific.

Denise: Robert, here's what will happen. I'll put this together. Let's see what time it is. It's about 5:00 Eastern. Let me work on this a little bit now. I'll probably have it to you before you open up your doors at 8:00 tomorrow morning, then I'll plan to call you next week. Does Tuesday look good for you?

Robert: Yes.

Denise: Okay. Would 2:00 your time work, or how about 4:00 your time?

Robert: Two o'clock is good.

Denise: And you are on the West Coast?

Robert: Right.

Denise: I will call you at 2:00 p.m. Pacific. Is this the number that I should reach you at, at that time?

Robert: Yes.

Denise: Terrific. Do you have my number, Robert, in case anything comes up?

Robert: I do, Denise. I got your card.

Denise: Okay, so then we're all set. I'll call you Tuesday of next week, that would be the 18th, at 2:00 p.m. Pacific.

Robert: Okay, great.

Denise: I'll speak with you then.

Robert: Fantastic.

Denise: Great, thank you.

Robert: I'm glad we went through that whole thing. I think that's a useful sort of overview. It went from just connecting to me expressing some interest and you digging a bit deeper. You didn't jump into everything you did until you asked some questions. Probably on a real call you would have even asked more questions, is my guess.

Denise: Yes.

Robert: Well done. When I was showing interest, it was like you weren't trying to close the sale, you were trying to give more information and then follow up on that information. I looked like a very good prospect at that point.

Denise: If I hadn't asked questions when you said originally that you wanted to know more about telesales, if I just assumed it was you, that would not have advanced the conversation. You do need to do a little bit of probing.

Robert: So a big part of this call is finding out what do they need, what are they interested in, what's the lay of the land, so to speak, in terms of this business, and then it can lead somewhere. That was a really good example.

When you reach someone, you're finding this kind of stuff out and you're giving them information, and then you're following up later. Notice, everybody, she didn't just say, "Okay. Well, I'll send you the information and I'll call you back later." She nailed down a time and made an appointment for the follow-up call. Then you don't play phone tag and all that kind of stuff that's such a time waster.

Denise: Not only that, it also books you to make a commitment to the next step. I can't tell you the amount of times I've run into people who actually make the first call and then don't make the second call.

Depending on your style and your commitment, it's always best to get a specific time to follow up, particularly if you have somebody interested.

Robert: It makes it easier for you and for them.

Denise: Because you're committed and they're committed. As long as they have a phone number and know how to reach you in case something comes up, you hold to your calendar integrity and they'll hold to theirs.

Robert: Then she sends a follow-up email that perhaps is a link to a web page. It has an attached PDF, something like that, in the email. It would describe what this is. It's not too long, but pretty clear. "Look at this. It gives you an idea of what we covered here that helps you do this and this." Then by the time you talk them, they have a good idea what it's all about.

Denise: The other thing that happened in that call is I had done my prep work to know that you were on the West Coast. I'm one of these people who literally has to have a translation key in front of me--2:00 equals X--to make sure I'm not calling, picking up the phone at 9:00 on the East Coast and waking people up.

Robert: Didn't we meet each other at a networking event?

Denise: Yes. I'm one of those people, so I have that in front of me. I knew that I wanted to advance the relationship to know more about what you were interested in. I also had my secondary piece lined up. I wanted to advance the

relationship, but then what if everything was going well, as this call did? You're an easy sale.

Robert: I didn't want to make it a hard one to begin with.

Denise: Yes, but I had everything prepared. What if they say yes? You have to be prepared for yes.

Robert: Yes. What are we going to send? "You want all that? Well, let me take a week to put it together!"

Denise: Right. You need to know what you have and what's available.

I personally think it can be overwhelming for people to try to figure out what they need. If the person is interested, they seem to know what they're talking about and they seem to be able to pick what they want, I'll lead with what I have. If they don't know what they want and they're really at a standstill and can't quite figure out how to get the next decision, I'll offer to do the assessment first.

You do need to know how the presentation of your services or your products is coming across on the phone. Does it need extra handholding, or can you deliver it in a logical manner over the telephone?

Robert: Of course, we could do role-plays on 10 different kinds of professional services businesses, but that's not possible in this. You really have to translate for your business. If you're a business coach, you have materials appropriate to you. If you're a consultant that offers a whole bunch of

stuff, you have to really narrow it down somehow to figure out what to follow up next.

It's always connection, information, follow-up as opposed to trying to make a sale or convince them of something yet. A big part of this call should be questions, finding out needs. "What's your situation? What's working? What's not working? Why are you interested in this?" I told you things aren't going so well and I hear people and blah, blah, blah.

The more you find out, the better you can make it work.

Let's jump to the next one. We can't spend forever on this. There's the voicemail call, the reach call, and all the way to the end of setting another appointment. What are the other two scripts or calls that happen?

3. Gatekeeper Script

Denise: The third script is the one for the gatekeeper. There actually are still gatekeepers out there. Depending on where you focus your marketing and sales efforts, you might in fact run into more gatekeepers than you choose to admit. You do need to have a script for gatekeepers.

Robert: And again, different situations. If someone gave you a card at a workshop, that's sort of easy. "He gave me the card at the workshop and asked me to follow up with him." Give the range of possibilities with gatekeepers.

Denise: The most important thing to think about when you develop a conversation with a gatekeeper is you want that

person to think that it's in their best interests to be helpful to you. You need their help. I always treat gatekeepers as an opportunity to advance me to my target rather than someone that I need to barrel through. I think of them as my ally.

There are a couple of things you should do. First of all, from a protocol point of view you should always make sure that you capture their name. As you're closing the conversation, you repeat their name. Say, "Thank you, Sally," "Thank you, Jim. I appreciate your time." That's one thing.

The other thing is you need to be focused on how what you are going to offer to the target would be a benefit to the target, but more importantly how the gatekeeper, moving you forward, would be a benefit to your target. That's how you need to develop your script.

These are harder to do in terms of developing a specific script that resonates every time. You kind of have to tailor it to each company or each target that you're talking to. Of course, as you describe, the one where he said, "Call me," is the easiest one.

It is important to have a script in place with some components in it around the benefit of the gatekeeper advancing you.

Sample Gatekeeper Conversation

An example for something like that would be, "Hello, Robert. My name is Denise Clancey. I'm calling from

Teledirect Partners. I have a service that I believe would be of interest to Mr. Jones, that would allow him to be more effective on the telephone and to advance his sales process more effectively via telephone. Would you be in a position to be able to tell me a little bit about your company and the work that you and Mr. Jones do on the phone?”

You ask permission of the person to give you more information and you say, “Would you be in a position? Are you able to describe for me?”

You also then, as part of the process, say, “Is there a good time to reach Mr. Jones? I do believe that he would benefit from hearing my offering, and your company would benefit from this offering. I want to make sure that he has an opportunity to understand the services that we provide. Is there a good time of day reach him? Is there a good time of week to reach to him?” You get very specific with the gatekeeper to see if you can’t get a connection.

Very seldom with a gatekeeper will they book an appointment for you. That doesn’t usually happen. What usually happens is after you’ve called a couple of times, you can do what I call the takeaway. You can say, “Listen, Sally, I’ve called a couple of times. I just don’t seem to be getting through. Would it be best for me to send something via email to Mr. Jones, or should I just wait for his return call if he’s interested?”

Many times if they’ve heard from you and they’ve taken your name a couple of times, they will do one of a few things. They’ll either march your name into Mr. Jones and

say, “Listen, I’ve talked to her a couple of times. Every time I talk to her, she gives me a little bit more information about her company. There’s a little bit of value here. I know we’re struggling with customer service, and you should listen to what she has to say,” or “I looked her up and it seemed credible.” Or they’ll say to you, “He’s never reachable. He’s never going to return your phone calls. He’s in budget meetings all the time now, and he’s not even going to entertain this.”

A lot of times, they’ll give you some information.

Robert: Right, then you put them on the follow-up for that.

Denise: Yes. But the most important part of it is they need to believe there is value in them advancing your cause. The way you do that a lot of times is through familiarity, respect and trust.

Robert: Okay. What I heard in the call is a very clear articulation about your core message of what you’re about so it’s understandable to them. “We help them with doing such-and-such.”

If it was me, for instance, I’d say, “What we do is we work with independent professionals such as Mr. Jones to help them get more clients faster, close larger deals and blah, blah, blah,” something like that. “So-and-so suggested I call.” Any outside connection perhaps would help a bit.

Denise: That always helps.

Robert: That always helps, whatever the connection is. “I thought this is something that Mr. Jones would really like to know more about,” as opposed to, “Do you think he’d like to know?” sort of from your point of view. I think you said something like that, right?

Denise: You can do that as well. You can do either approach. You can actually mix up the approaches. “This is what we do, and this is what we offer.”

Sometimes the gatekeeper will say, “We don’t need any of that. We don’t do any of that. We don’t have a customer service team. We outsource the whole thing.”

Robert: Remember, most of the people who are listening to this audio program are independent professionals selling non-commoditized types of services of all kinds. This kind of call is often the most difficult one. It’s more like a cold call or a follow-up from a connection or referral or something like that. A lot of people on this call might not even make this kind of call. It’s more the kinds of things we talked about earlier.

Let’s give a little bit easier scenario. You got Mr. Jones’ card at a conference when you led. You’re in Boston. He’s in Dallas. You follow up a week later. He expressed some interest or gave you a card for follow-up, and you reach a gatekeeper. What kind of thing would you say in that case? That should be a little easier.

Denise: That’s a lot easier.

Robert: Because there’s the past connection.

Denise: The other approach with the gatekeeper was a completely cold call. If you have a past connection, if he asked you to call, if you know someone who knows him, the gatekeeper will always do something for you, if in fact there is a mutual respect between gatekeeper and boss, which there usually is. You have to assume there is. They will always do something for you.

I call that the “trump card.” In that case, you always pull out that card and use that as part of the process. Here’s how it would go if I were calling Mr. Jones. I’ll just take that his associate, Bill Smith, suggested I call.

Sample Gatekeeper Conversation

Hello, my name is Denise Clancey. I’m calling from Teledirect Partners. Bill Smith suggested that I give a call to Harry Jones because Bill thought that I could work with Mr. Jones,” or “I could offer some service to Mr. Jones that would benefit Mr. Jones and his business. I work with small to mid-sized businesses and with independent professionals, and I help them be more effective on the telephone, either by increasing their revenue or improving their customer communication. Is Mr. Jones available that I might speak with him?

Robert: Well, not right now. He’s out of town until Tuesday.

Denise: I’m sorry. I didn’t catch your name when I first spoke.

Robert: Oh, my name is Robert.

Denise: Robert, I wonder if you could help me out.

Robert: Sure.

Denise: Mr. Smith did think this would be a great conversation to have with Mr. Jones. I wonder if you could suggest for me some times or days of the week that are best to reach him. Is he usually available in the morning?

Robert: Yes. He usually gets in about 7:30.

Denise: Okay. And are there particular mornings that I should avoid? Are there good mornings? What would you suggest?

Robert: Never Mondays. Tuesday, Wednesday, Thursday, sometimes Friday.

Denise: Okay. You know what I'll do? I'm going to try to reach him next week. I'll probably try to reach him on Tuesday around 7:30 or 8:00 to see if I can't reach him and speak with him directly.

In the meantime, if you have an opportunity, Robert, I would love it if you would take my name and number and just tell him that I will plan to call him Tuesday. Let me make it 7:30. I'll plan to call him Tuesday at 7:30.

Robert: Okay, well, I'll let him know that. And if that doesn't work, I'll let you know a time that might work better.

Denise: Robert, if I don't reach him at 7:30, I'll be sure to give you a call back and we can touch base and talk about his calendar. How does that sound?

Robert: All right. Is there any information you can send me ahead of time?

Denise: I would be happy to do that. Would you be willing to provide me with an email address?

Robert: Sure. Send it to my email address. Then I can hand that to Mr. Jones.

Denise: Here's what you can expect from me. I will send you an email with a few pieces of information that should be pertinent to his business, particularly based on the conversation I had with Mr. Smith and what I know of it. I will follow up with him next week at the appointed hour.

In the meantime, in the email, there is my contact information, so if you need to reach me for any reason, you can feel free to pick up the phone and give me a call.

Robert: Okay, great.

Denise: Okay. Thank you, Robert, for your time. I look forward to talking with Mr. Smith.

Robert: Okay, good.

Denise: Bye-bye.

Robert: Mr. Smith or Mr. Jones?

Denise: Mr. Jones. I'm getting Mr. Jones mixed up! I should have written it down. I wrote down your name, though.

One of the things I try to do, if you had answered the phone and said your name, I try to quickly write it down, but if not, at the end of the call, if I haven't caught their name, I ask them their name, and I use their name at least once. People love to hear their name pronounced.

Robert: Absolutely. That's good. It's just a business conversation you're having. You're not treating them as an adversary, but someone who can help you. You're very straight and direct about what you do.

Sometimes I suppose you get gatekeepers who, after all, their job is to screen things that seem inappropriate. "We have the best copier supplies in the world," you're probably never going to get through. But as a professional service with a lead, with a connection, with something like that, approaching this in a very straight forward way, you're going to have more luck, right?

Denise: Right. Also if you've done your homework correctly on this one, you get Mr. Smith who mentioned Mr. Jones. You say to Mr. Smith, "Would you mind if I followed up with him and used your name?"

Now you're committed to Mr. Smith, and you're committed to Mr. Jones, and I would also hope that if you're committed to Mr. Smith and Mr. Jones and something happens to advance Mr. Jones' relationship

that you would drop Mr. Smith a note to say that. It goes full circle. It advances two relationships at the same time.

I know we're just kind of doing this role-playing on the spot here, but it's always good not to have it too pat and too slick.

Robert: If it sounds too scripted, or even if God forbid you read anything, it's an immediate turn off.

Denise: Right. You could have all the words in front of you, but try not to sound too slick. Then you sound like you're calling from a telemarketing service bureau.

Robert: And we get enough of those calls already,

Denise: Yes.

Robert: So, Script 4, what's that?

4. General Interaction Script

Denise: Script 4 is what I call the General Interaction Script, the General Casual Script. There are a couple things you need to be prepared for.

First of all, what if you get a phone call and it's somebody you met at a networking event? Lo and behold, they decide to follow up with you because they were interested in your services and your offers. It does happen every once in a while.

Robert: Sure it does.

Denise: Having said that, you should have something prepared that allows you to not only identify the common questions and responses to those questions if someone was to call you, but also a couple little pieces of information about your business that you impart as part of the conversation.

This doesn't have to be very scripted because every inbound call is not going to follow your flow if somebody else is directing the flow, but you should have that prepared for general interaction. It can be, in part or in whole, very similar to conversations that you have at networking events or face-to-face where you're describing your business. It can be very similar.

Robert: Yes, and if people studied any of my materials such as the InfoGuru Manual, I emphasize talking about problems and issues and outcomes, not process to begin with. "We help people who have this issue or concern. We help them produce this result," as opposed to, "Yes, we lead all these workshops and these are the 50 things about the workshops."

Can I give you a great example? Somebody calls me from the Yellow Pages. They say, "Do you do brochures?" and I happen to do brochures, or I used to. I would answer this, "What we do is we help small businesses attract more clients. Is that what you're looking for?" "No, I just want to get a price on a brochure."

I know that's not a client I want to work with, so at least I've screened them out. I always am very clear about what I am about. I help my clients attract business.

They say, “No, we just want a brochure.” “Well, we can help you with the brochure, but what is the purpose?” “Well, we just want to get a price.” Get the idea?

Denise: Yes.

Robert: The more you really know what you’re offering, you don’t go down the rabbit hole where they want to take you, which is usually not where you want to go. You have to be very clear about this message. “What our business is about is helping our clients do X,” or “helping them with this problem or concern.”

Tell me a bit more what you might say if I say, “Hey, I just saw you in the Yellow Pages. I see you do telemarketing training. Is that what you do?”

Sample General Interaction Conversation

Denise: “I think the quick answer would be yes, but the more specific answer about my telemarketing is that I work with independent professionals to help them improve their relationships and the relationships that they’ve established over the telephone. Is that something you’re looking for?”

Robert: “Yes, definitely,” or not and the conversation goes that way. It’s that very clear message that you’ve prepared. It’s just like you prepare when you go to a networking event and people say, “What do you do?” Right?

Denise: It’s very similar. On the telephone, you don’t usually have the opportunity to say something very lengthy before

you've lost them. Sometimes you don't even get the opportunity to do the follow-up when they say, "Oh, that's interesting. Tell me more."

You do need to keep it as succinct as you can and get your message across. You need to use, in my case, "build relationships." I need to use the word "telephone." I need to get some certain words out that allow me to be short, sweet, to the point but not too short and certainly not too lengthy.

Robert: Right. Once you get to that point, you can elaborate more, and it goes from there.

Denise: On the telephone, you should always be prepared to ask them a question. "Is that what you're looking for? Does that sound interesting to you? Is that the reason you called?" You should be prepared for that.

Robert: "Tell me more about your business and your needs."

Denise: Right. If you meet the same person at a networking event or at a presentation, you can watch their non-verbals and then more through the conversation, where you don't have the luxury of that on the telephone. You have to get them to come into the conversation as soon as you can.

Robert: Okay, good. We've covered a lot of really good information in this. We still have a lot of more information on tips and ideas, but the last piece on this is how do you really make sure that this works? I mean, this is the essence of what you say, how you say it, when you say it. How do you get better at that?

Denise: It's the old adage, "Practice, practice, practice." I recommend that you take it in steps and you practice. As you're developing your messages, you should constantly be in the mode of refining your message and trying slightly different techniques and variations to get it better and better.

Where would you start when you practice? First of all, you do need to write your call guide, and you do need to identify the questions that you might be asked or the objections that you might hear and what a nice response would be.

You should practice this response. Speak them out loud in front of a mirror. Perhaps call a friend. But practice your responses because the written word looks different than the spoken word sounds. You need to have it sound like a conversation or a part of a conversation.

I recommend you do a number of things. You create your call scripts, your call guides. You create your common questions and answers. You practice in front of a mirror. You could even call your voicemail system or your answering machine and practice there.

Robert: And leave a message, then listen to it?

Denise: Leave a message and listen, yes. You could buddy up. If you really tried to launch your business in this way over the telephone, you could actually do a little bit of a buddy system or a mini-mastermind group just around these techniques where you could practice by calling people.

In those situations, they could take both sides of the conversation and throw you some curveballs to intentionally fluster you to see how you handle it. Practice is the name of the game.

I always recommend, if you have the luxury of it, to tape your side of the conversation because that provides you with some insights that you tend to have before you started the phone call.

You do need to take the time to set out your goals for the call, to have the right tools around the telephone call in front of you, the right information about what you're offering, what the advantages and the benefits of your service is and would be for the person.

You should have it built into your repertoire how are you going to ask to advance it to the next step. How do you advance the relationship to the next step? What are you going to say that allows you to do that?

Robert: You should never just leave it in their court. You should recommend some things, is what you're saying, right?

Denise: You should recommend something. You'll always hear me say things, like, "This is what I'd like to do. Here's what I recommend would be the next step." You don't have to be that forward. You could use different words.

Robert: "This is what we would usually do." Things like that.

Denise: Or for a situation like you just described, Robert, “Here are the recommendations that I usually provide. This is the information I usually provide. This is what I usually say we should do now. This is what I say we should do a week from now.”

It depends on the progression. It depends on your style, but also the style of the person on the telephone call. You either go quickly through it or slow it down.

I think people would be surprised if I didn’t take the bull by the horns and say, “This is what we’re going to do.” Knowing my personality, people would say, “That doesn’t sound like Denise.” You need to be true to yourself in this regard.

Always advance the call. I call it the “ask.” What are you trying to get to? Where do you need to go? You could say it in a lot of different ways.

Then you should always have, and we talked about this on the call prior to this, a strong flow. “Strong” doesn’t mean come through the phone at somebody so much as, “This is what we’ll do now. This is what we’ll do first, second, third. Here’s my phone number.”

Think through. What happens if they need to rearrange the schedule? Do they have your phone number? Those kinds of things.

Robert: So you have a process, and you’re very clear and direct about communicating that process.

Denise: Right. If I'm going to do a lot of phone calls, I'll actually write the process out, and as I'm going through the phone call list, particularly as I get to the close, I'll start saying, "Did I get to the next step? Did I ask them or tell them or imply what we're going to do next together or me separately? Did I get to the close? Did I give them my phone number? Did I give them my email?"

I'll literally check the box as I'm walking through the conversation. You could actually create, if you needed a guide for the call, a basic thing that has information about the company but also what your next steps are with the company.

Robert: Okay, great. If you were having this conversation with an actor about preparing for a play, it would be pretty obvious they would have to practice and memorize the lines, but it's kind of funny that in a situation where you're making calls, a lot of people just think they can handle it by winging it.

That's not very professional and it's not very effective. This is your livelihood. You want to be prepared. If you are, it's going to make a lot of difference.

Denise: It's interesting that you bring up that analogy because a lot of people will say, "I'm not really good at this," but if you do prepare and practice, you put yourself in the mode of saying, "It's show time. I'm on."

Robert: Show time.

Denise: There are a lot of people out there that sell over the telephone for a living yet you wouldn't recognize them on the street based on how they interact with you. As I'm sure most people know, you can be different on the phone than you are in person. It's just a matter of practicing to develop the right skills.

Robert: Okay, good. In the next part, what we're going to do, Denise, is talk about some of the tools and basic tips and techniques and a few other things. Let's just end this. We can pick up the next recording where we'll start with the second part.

End Part 1