

The Inside Sales Solution



How to build and
manage a team of
outbound prospectors
and take back control
of your lead generation.

NANCY CALABRESE

ONEOFKINDSALES.COM

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HOW TO BUILD AND MANAGE A TEAM OF
OUTBOUND PROSPECTORS AND TAKE BACK
CONTROL OF YOUR LEAD GENERATION

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oneofakindsales.com

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INTRODUCTION

Let's cut right to the chase. This book is unabashedly about picking up the phone and dialing your next most profitable customer, engaging them in a conversation about something that's good for them—the solution you're selling—and starting a relationship that leads to a sale.

In other words, cold calling.

Before you run away to write another blog post that almost no-one will ever read, or share something on LinkedIn then sit back and “hope” that it brings you a customer, let me ask you...

Are you open to discovering something new?

Will you welcome any new customer that you attract profitably?

If you answered either of those questions with “no,” then you may as well put this book down now. It's not for you. However, if you answered “yes” to those two questions, then, let's continue. I'm going to show you

how to bring your flow of new qualified leads back under your control.

The Inbound Marketing Myth

Inbound marketing is the buzzword of the decade. Don't get me wrong, I'll take a customer from any method and I and my company—One of a Kind Sales—use inbound, outbound, and referral marketing. The more the better.

But lately, inbound marketing has taken on a religious quality. As if there is something dreadfully wrong with reaching out in a friendly, direct way to people who could benefit from what you offer.

Personally, if you truly sell a solution to people who desperately want to solve a problem, I believe you have a moral and ethical obligation to communicate your solution to those people.

If selling is serving, then should we not merely sit back and wait for customers, with significant challenges and looking for a solution, to come to us?

As with any business strategy, having all your eggs in one basket is never a good idea. The “Google Slap” is real. With a tweak of the algorithm, Google picks business

winners and losers. As do all of the online advertising platforms.

Great if you're on the winning side, but it's becoming more difficult to win at SEO and profitable online advertising with each year.

Bringing Business Development Back Under Your Control

I don't know about you, but there's nothing that will keep an entrepreneur or executive up at night like worrying about where the next customer (or next 100 customers) is going to come from.

Direct outreach, as you'll see in the rest of this book, puts one channel of new business development 100% under your control (if you do it the right way). As I'll show you, if you have something that customers need, your success is the predictable outcome of a series of activities.

When I'm working with a company to design an outbound prospecting strategy, we map those activities, then we build a system of relentless measurement and "work the system." The outcome—sales growth—is simply a product of the activity. (As you'll see later, if you've tried outbound prospecting before, without success, this is likely one of the main culprits.)

What's to Come

I've intentionally written a short book. The goal isn't to give you every tiny tactic of prospecting success. The tactics often change from business to business, based on what you're selling and who you are selling to.

Instead, I want to show you the key components of strategy that you must put in place to develop a successful outbound prospecting program. One that drives consistent, qualified leads and sales. One that can form a foundation, on top of which you can build your other (long-term) inbound marketing efforts.

It's not a question of should you do inbound or outbound. You should be doing BOTH.

The Future of Your Sales

The foundation of your future sales efforts is your inside sales team, no doubt about it. At the same time, there is a resurgence of outbound prospecting. If you're not doing it you're leaving money on the table.

There has been a long-time push to bring outside reps in for a few reasons: it's a major cost-savings, and the beauty of inside sales is that a lot more is accomplished. Plus, inside sales brings accountability.

With outside producers working remotely, there's no way to track what they're really doing. With inside sales, you can track and judge –people on real metrics, and the behaviors they're engaging in to hit their goals.

Having an “always-on” outbound prospecting program gives you a source of leads that is 100% activity-based, which you can control and manage. It's a very di-

rect approach to reaching your most ideal potential clients. It's like a conveyor belt of constantly replenishing prospects. Your salespeople won't waste their time chasing after the wrong deals.

Having an "always-on" outbound prospecting program gives you a source of leads that is 100% activity-based, which you can control and manage.



Whether you don't have any outbound sales effort at all, or you do but it's ineffective and you're not happy with the leads it brings in, you need to make this change.

Outbound Prospecting Is More Important Now Than Ever

You're no doubt open to every avenue available to grow your business. Inside sales/outbound prospecting must be part of your sales outreach moving forward. It's a laser-targeted and focused approach to getting more sales, and it will save you money compared to traveling to attend tradeshow and the like.

You don't have to do it alone. As with many business functions today, outsourcing to experts in a specific field, in this case inside sales, can be an effective solution and a way to implement this new approach quickly.

Cold calling still works, but it's different today than it was 10 years ago. We are in voicemail land. But people do return calls; they do respond when you leave a message that is crafted to create curiosity. And when they do reply in those cases, we often set the appointment.

When companies say cold calling doesn't work, there are a few reasons why it's not working for *them*:

- They think cold calling makes them sound desperate.
- They are afraid of rejection.
- They haven't been trained in doing it.
- They haven't been trained in soft skills.
- They haven't been trained to sound a little different than other callers.
- They aren't probing for pain (because when there's no pain, there's no sale).

- They have unrealistic expectations and believe that a sale comes from one conversation (when you actually have to build a relationship first).

Cold calling does work— when you have the right scripts, follow up tools, and training for your callers.

The Phone Should Be Your Best Friend

It's surprising how many businesses don't use the phone. It's an outstanding tool to use in prospecting. It's right there, and it doesn't cost you a heck of a lot to dial out and engage in human conversation.

The nature of sales has really changed in recent years. We have one client, for instance, who insists on approaching every prospecting call as a features and benefits conversation.

But what has happened in their marketplace, is the appointments that are scheduled aren't sticking because the caller was not asked to develop or nurture any sort of relationship or get further information about issues the prospect was facing— it was all about the company, not the prospect. This is a recipe for cold call failure.

Instead, what you want to do, is get the prospect to talk to you about their problems. In the first call you're not going to get all of the real pain. But the job of the salesperson is to impress them by asking a lot of questions about that pain to start the process.

The phone allows salespeople to communicate in a consultative mode that begins developing trust with the person on the other end of the phone who is, technically, a stranger.

Also, from a cost point of view, using the phone as a prospecting tool is probably one of the least expensive ways to take your brand to market. And you have the opportunity with the phone, if you have the right CRM, to connect with many more people than you ever would in a networking event.

Cold Calling Still Works – When Done Right

People say, “Cold calling is dead.”

It still works, but for it to work in today's business environment, you need the tools, meaning the scripts, training, and understanding of how to sound different, as well as an effective lead-management CRM that will track and monitor your efforts, not to mention contain vital data about your prospects and automatically let you know the best time to call... and when to follow up.

This is key because otherwise your cold calling efforts will be less effective. Consider this data from the Brevet Group, a marketing consulting firm:

- 92% of customer interactions happen over the phone.
- It takes eight to twelve cold call attempts, on average, to reach a prospect.
- 80% of sales require five follow-up calls for the first meeting to close.

There really is a resurgence of outbound sales prospecting, which is a fundamental change compared to the trend of inbound sales/marketing of the last decade. That's not to say that those inbound efforts don't have a place today.

The fundamental truth is that all profitable methods of acquiring a customer are valuable, and a diversity of lead sources equals a resilient company.

For example, if a company that gets all their leads from the Internet and their AdWords or Facebook Ads account gets banned (which is a real and present threat,

just ask any online advertiser) or their SEO efforts are “slapped” by the latest algorithm – they have nothing to fall back on. It can take you years to pivot after a crisis like that.

When you use the phone as part of your overall marketing strategy, which might include email, social media, and more, you're not dependent upon those channels. Whether or not Facebook closes your ad account won't matter as much. And you're not having to hope that you run into the right prospects at the next networking event.

Outbound prospecting through the phone is a way where you can build a very focused list of your best prospects, and you can reach out to them directly.

Prospecting through the phone allows you to build a very focused list of your best prospects...



Your success is driven more by your activity than anything else. As I mentioned earlier in this chapter, to even reach a prospect requires, on average 8 to 12 touches.

The phone is a technique that sets you apart. Your competitors are doing everything that you used to do, and they're missing this component in their marketing and sales program. The most direct way to engage with someone is human to human, voice to voice over the telephone. That gives you an edge.

With the right conversation, which comes from proper training, people are going to take the call. People are going to agree to make an appointment, and you are going to get new business out of the prospecting efforts. If you have a service or a product that the marketplace demands, you will grow your book of business.

A Sniper Versus Shotgun Approach

When we talk about outbound prospecting, this is *not* the old “dialing for dollars” where you open the phone-book, starting with the “A’s” and working your way through. That’s the shotgun approach to cold calling, which is time-consuming and expensive— not to mention frustrating.

Instead, you should be like a sniper, targeting your prospects by focusing on your niche and specialization to find your ideal clients—those most receptive to your message and most interested in what you have to offer.

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on your niche and specialization
to find your ideal clients.



What's the vision of your company and your customer base? Inside sales allows you to stick to that vision.

When companies rely 100% or almost 100%, on referrals, what often happens is their book of business may not wind up being what they wanted it to look like. Because you feel obligated, you might take on smaller accounts because you've got another larger client who sent them your way.

Therein lies the beauty of outbound prospecting: You can target organizations that you absolutely know you want to be involved with.

With outbound prospecting you can identify companies you actually want to go after and those that you don't – and that could be for several reasons. Perhaps

they aren't your ideal prospect or maybe just the timing is off.

First Steps

If you're going to do outbound sales, here are the things that you need:

- You must identify your target audience based on your niche or specialization. You don't want to be a generalist. Be specific in who you target.
- You have to build a list of leads based on that audience.
- You need a customer relationship management (CRM) tool that can handle lead engagement. We recommend VanillaSoft. When you have a CRM, you have a system to keep conversations going after you set an appointment via email and other means.
- You must create effective messaging for your callers, including scripts and cheat sheets on rebuttals to objections.
- Marketing materials.

- Access to calendars.

Once you have all this prepared, you have what we refer to as a toolbox.

Defining How You Follow Up on Leads

You need a methodology, we call it a sales cadence or outbound cadence, to reach your audience of ideal clients... and connect with them.

Many sales teams have no formal system that's replicated internally in terms of how often they follow up on leads. The general rule is that, on average, a salesperson will make three attempts to reach their target.

When they don't, they move on... maybe they'll call them six months down the road, but there's really no system for follow up.

That's not good because it doesn't account for the reality of the situation. To reach a C-suite decision-maker you need to "hit" them 8 to 12 times, at a minimum, to get their attention.

To reach a C-suite decision-maker
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An outbound cadence is a system to organize your outreach efforts.

What we recommend is organizing your leads into a three-month period per caller. (It could be a two-month period or four-month period.) The goal is you work those same leads for four weeks, and you build into that four-week process different messaging. That way, by the end of the fourth week, when you haven't spoken to your lead, you know that they will be recycled and be back in the salesperson's queue.

That's part of the cadence. Then what we recommend in month two and three is that they initiate an email drip

campaign. So, in that second month, that lead is not being called. The CRM automatically triggers emails to be sent so you continue to “touch” them.

The overall goal with the outbound cadence is to have human interaction four times a year, each time for a four-week period. That makes you top of mind for that lead – at the right time.

It doesn't matter how many leads you have if you don't have the system in place long enough to “hit” the prospect enough times, and in the right way. Remember, it's the second or third rounds that the relationships develop. The number of leads does matter. Many companies have way too many leads/callers. Less is actually more.

The beauty of having a CRM, like VanillaSoft, which has intelligent why not intellectual (that's what it's called) routing, is that the recycling is automatically built in. Your team doesn't have to manually do anything. So, it makes them far more efficient.

You Must Have Effective Messaging and Scripts

Any salesperson who says they don't need a script... doesn't belong in sales. I stand by that 100%.

The truth is that people who “wing it” on the phone, sound like they're winging it and are ineffective because they don't have a structured process to follow so that they can think ahead while speaking with the prospect.

Here's an outline of an effective script:

- The introduction should be unique and non-salesy.
- Ask permission to give you 30 seconds to explain the purpose of the call.

- Introduce your company with a brief description of what it does. Focus on value. According to a study by HubSpot, 96% of buyers say a focus on the value your company can deliver them impacts their purchasing decision.
- Offer three examples of problems you solve.
- Then ask the question, something like: “Is any of what I stated compelling and worth a conversation?”
- Then... shut up.

The value of having that in your head is beautiful because the real work in sales comes when you have to deal with the objections. The truth is that you don't know what the objections are until you have a conversation. So, having a script makes your job easier. Having a script grounds you.

Once you have the script memorized you begin to sound natural and very non-salsey.

When they start talking about their pain points, your role is to listen, empathize and allow them to express their issues in detail. The key is to actively listen and probe to keep them talking about their problems.

When you get this information, you can determine whether or not you can fix their problem. Are they a fit?

A script allows you to uncover more information than you normally would if you wing it.

Consistency Is Key

You develop scripts for everyone on the team to ensure consistent messaging and branding. So that your calls go out the same, no matter who on the team is calling.

The Conversational Selling Script™ is for when you speak with a decision-maker. But you also need to develop voicemail scripts and email templates that match the voicemail scripts. You need scripts at all levels so that you have consistent messaging/branding from everyone on the team.

I recommend a process for developing scripts.

Develop five case studies on past clients. Think about what their issue was— that's the title of the case study. Talk about what their problem was, and how they resolved it. Each case study should cover a different problem that your prospects might have, too.

Those case studies become the meat of your script. You extract the “pain” from those case studies and put it into your script and adapt the right case study to the prospect you are calling.

You don’t have to know everything about that client. You don’t have to be an expert.

You’ve got your script. You’ve got your pain points. Don’t ever go into sell mode in a call when your goal is just to set the appointment.

That’s it, never sell. You uncover information.

It’s the customer stories or case studies, that help you uncover what problems the prospect have. This then becomes the “meat” of the appointment conversation.

The Structure of the Cold Call Script

The process of cold calling is fraught with fear and frankly, a bit of misinformation. In this section we will talk about what a cold call should and should not include and the steps you need to take to get the best outcome.

Cold calling is the process of reaching out, via the phone, to a prospect - someone who has been identified as someone who may need your product or services.

A cold call is NOT a sales call, but a conversation.



The goal of a cold call is to determine if the person is, in fact, a decision-maker, if they have a problem you can solve and to set an appointment for a future conversation.

By methodically following these steps, you will learn how to make cold calls that result in qualified appointments.

First, identify who you will call

A good call list is key to effective calling. Calling any and every business in the phone book will be a waste of time. The same is true for calling from an old or outdated list. Make sure you are calling from a clean list of good prospects. Spending time on curating and cleaning your list will lead to better results!

Memorize and internalize your script

Your job will be easier if your script is memorized and its delivery becomes second nature. This way, you will sound more natural and be able to focus on listening and pivoting as needed instead of reading and sounding like a robot.

Memorizing the script will allow you to own it - to make it your own and to deliver it naturally.

A script will also keep you on track, helping you get to “NO” more quickly and on to your next call without wasting time.

What you do NOT need to do

You do not need to do too much research on the prospects before you call. Make sure you have their name, the company name and some basic info about the company but this will be a conversation, not a sales call so the prep is minimal. There will be time to do research if and when you have set an appointment.

Pick up the phone

The goal here is to have a four to nine-minute conversation with the prospect. During the call, you don't want to sound like every other sales caller.

What NOT to say

Opening with “Hi my name is Nancy Calabrese and I work for One of a Kind Sales. How are you?” is a bad idea.

Upon hearing an opening like that, the prospect's natural reaction is likely to be, “Oh no! It’s another sales call,” and they will probably want to get you off the phone!

“How are you?” is simply disingenuous. Don’t ask.

What to say

What you should do is to determine if they are the right person for the call and ask permission to give you 30 seconds for the reason for the call.

Then introduce your company, explain what you do and share what “issues” business executives are experiencing. Ask if they are experiencing any of these issues... and be quiet. Let them respond.

Uncover their pain points

Once they share what their issues are, we need to get to the root of their problems. Keep them speaking about their problems. Uncover their pain and the loss(es) to the company and their bottom line. People buy based on

emotion; try to connect on a level where they can feel comfortable disclosing their feelings.

Shut up and listen

Ask probing questions and then really listen for the answers. Ask follow-up questions to dig deeper. Remember to emphasize. This is a conversation, not a sales call.

Evaluate if this is worth pursuing

By this point in the conversation, you should have a good idea of whether or not your product or services can help this person. If you can, move to set an appointment.

Set the appointment

Rather than try to answer all their questions now or start trying to actually sell them on this call, explain that you don't have the time to go into it now and set an appointment to discuss this further. Ask if there is anyone else who should be on that call and coordinate as needed to get this on the calendar.

Appointment details

We recommend setting the appointment for no more than a week or two out from the first contact and to plan for a 30-minute first-time call. We find that is a good amount of time to learn more about their issues, outline

the process and to determine if we can move towards closing a sale.

In 30 minutes, you have a deeper discussion of their issues to determine if they are worth moving to the next step. You can then set yet another appointment to move forward.

If they won't commit to even 30 minutes, they are probably not a real prospect and you may want to cut your losses. The same is true if they want to set up the first time call for a month out. Yes, you can call them back in a month to check in but that is not an "appointment". See below for digging deeper to determine which path to take.

Do they foresee any conflicts?

Ask if there are any obstacles, they foresee that may prevent them from making the call. See how you can accommodate those concerns (maybe re-schedule now rather than have a conflict then) or invite someone who needs to be involved in the process. Addressing these concerns now will help ensure that the second meeting actually takes place.

Review the agenda

Before ending the cold call, set and review the agenda for the next call so you are both on the same page as to

what will be covered and let them know that you will be sending a questionnaire. These mini 'buy-in' steps will help you move closer to the final closing of the sale, building trust and solidifying your relationship with them.

Send the questionnaire

Our procedure involves sending prospects a questionnaire to collect some additional information about their problems. It also is a signal to us that they will be involved, it gets some skin into the game and helps prepare you for the meeting.

They may NOT be “appointment worthy”

Not all cold calls will lead to an appointment. Your job is to determine who is and to weed out those who are not. It is not a failure on your part to end a call without an appointment if they were not, in fact, 'appointment worthy'.

Some prospects are not worth setting an appointment with, either because they don't have a problem you can solve, or they are happy with their current provider. If this is the case, exit, but be sure to ask for a referral!

Ask for a referral

Just because they didn't do business with you doesn't mean that they don't know someone who might need your help. Studies show that 20% of prospects are naturally helpful and will offer referrals. Another 20% are just not going to do it. But the vast majority, that other 60%, might... so definitely ask.

Prep for the first-time call

You do not need to do much research before the cold call. This is because you are likely to go into voicemail.

But once you have an appointment set, take some time to learn a bit about the company and pull a few case studies that might be relevant. But don't overdo it, as you will continue probing in the first-time appointment as well.

Prepare to make a strong impression with data or stats, without bowling them over with a hard sell. A first-time call should be a deeper dive into their problems to determine next steps. It's best not to go into "sell mode" but schedule another call to present a solution.

Scheduling is key

Don't schedule your appointments too tightly - leave a gap in between to allow for additional time with a pro-

spect if needed and to take care of your other tasks. And build in time to prepare for the calls as noted above.

Cold calling is a vital part of any businesses' growth strategy. It need not be something to fear!

The Need for Continuous Sales Training

The painful truth is that less than 60% of salespeople hit their quota. Sales is a “no” business.

People hired to do sales are constantly hearing “no.”

Consistent training in sales techniques is vital. And, I recommend group training specifically, because it is beneficial in several ways:

1. It develops friendly competition among your salespeople.
2. You benefit from the experience of other salespeople, learning their tricks of the trade.

3. Group collaboration is critical to celebrate successes and share challenges, which fosters the team and builds a company culture of “we’re all in this together”, and a “we can do it” attitude. A critical antidote to always hearing “no.”
4. The team feels supported and appreciated by management, which leads to an effective team that has no problem getting those “no’s” because the more “no’s” they get, the closer they are to getting their yes.
5. The call team feels valued because they’ve received amazing training. That leads to lower turnover. It becomes an important benefit to salespeople looking to master their craft!
6. Finally, with group training, combined with one-on-one training, the team’s skills improve. They get better results week after week.

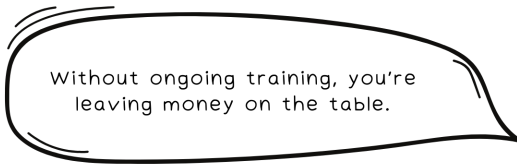
For the sales leader, the training process also quickly shines a light on performers and underperformers.

Ongoing training programs yield real results in retention of necessary skills. According to a study from the Association for Talent Development:

“Companies that offer comprehensive training programs have 218% higher income per employee than companies without formalized training. These companies also enjoy a 24% higher profit margin than those who spend less on training.”

How many times have you gotten a telemarketing call, and the person is reading from a script?

You say no. They say goodbye.



But when a sales team is coached and trained to overcome those objections, not just with the script, but with their tone of voice, they become much more effective.


When you sell over the phone, it's all about the voice. It's all about communicating in a way that the person on the other end likes to be spoken to—and there's a lot of psychology behind this.

With the right sales training, telemarketers are morphed into salespeople and what happens is that they'll have more meaningful conversations that will eventually lead to qualified opportunities. And that impacts top-line revenue.

Without ongoing training, you're leaving money on the table.

The Elephant in the Room

Too often, inside sales teams are considered mere “telemarketers.” They are viewed as second-class citizens in companies; they feel unappreciated– which leads to turnover.



Find someone who loves the "thrill of the Kill" over the phone and they'll create gold for your business!

But these teams can be your biggest asset in both good and bad economies. They can be the ones that create gold for your business.

I have a client I'm pretty disappointed in right now. Their team is setting appointments, and they're being cancelled because of COVID-19. These callers are not getting credit for scheduling appointments because management is not sure if they're *really* appointments.

They're being very bottom-line oriented even in this difficult time, which is disappointing because the team is performing as best as they can, and they're not getting the recognition.

Cold calling is a tough job. Most don't want to do it.

Finding someone who loves the thrill of the kill over the phone is like finding a needle in a haystack. Once you find these people, take care of them as they are vital to the success of your business.

Here's what an appropriate compensation plan that motivates callers looks like:

1. Base salary/hourly salary.
2. A bonus on set appointments that are kept.
3. Increase the bonus if they surpass their average appointment goal during a payroll period.

For example: Campaign A averages four appointments per pay period. If they set 5 or more, the bonus per appointment doubles.

4. Separate campaigns into tiers based on the complexity of the campaign.

“Easy” campaigns (easy to set appointments) and “difficult” campaigns should have different bonus amounts. Easier campaign bonuses should be lower than those for difficult campaigns.

Manage the Activities, and the Results Are Inevitable

Many company leaders have no way of tracking the leading indicator activities of the sales team. But tracking and management by the numbers (of activities) is vital to sales success.

Not all numbers and tracking systems (CRMs) are created equal or suited to your purposes. Salesforce, for example, is NOT an efficient prospecting tool. Your prospecting team needs a prospecting-specific sales engagement platform that can track:

1. The amount of time on the phone.
2. How many dials per hour.
3. How many conversations per dials.

4. How many appointments to conversations.

That gives management a clear view of the effectiveness of the team and its individual members based on key performance indicators (KPIs).

Often, for companies that didn't have software to track this previously, this is very eye-opening.

The perfect example is a client we onboarded a year ago.



Their callers were averaging four dials an hour, maybe six. Software is available to increase that to 20+ an hour. That blew my client away as it was clearly apparent that the callers were not doing their jobs. They weren't prospecting. They were doing everything but. They were

researching and spending their time trying to gather information, which I say is not good for prospecting.

You don't need to do a ton of research. The research comes when you're compiling your lead list, not when you're dialing. Because when you're dialing, chances are you're going to get the lead's voicemail, which is when you deploy the voicemail script. So, you've wasted that time on research.

Another element of using software is the ability to listen to call recordings (where legally permitted). You listen to how they sound, how they handle objections, which is where most salespeople have trouble. If they've been provided rebuttals to objections, how are they handling that?

This circles back into group sales training. Are your callers willing to practice objections, responding to rebuttals? Are they willing to roleplay these scenarios? Yes, they must be willing to be in the hot seat. Everyone in sales has to be willing to dance, that's their job. Group training and roleplaying are an opportunity to sharpen their skills.

That brings us to the next step in this improvement process.

How to Track the Quality of Appointments and Prospects

After your callers set an appointment, your job isn't done yet. You now must track the quality of the appointment that was set. That's where you need collaboration with other team members in the sales department and management to provide feedback on appointment quality. Unfortunately, management all too often doesn't provide useful feedback.

The biggest complaint in appointment setting is that the appointment is set, the producer goes out, and the prospect says, "I didn't know about the appointment" or "The caller wouldn't let me off the phone, so I accepted it," or it's a "no-show".

The first two issues must be nipped in the bud and corrected by the caller. You might be tempted to wonder whether no shows are just random or a problem inherent in the process. But, if you build quality pre-qualifying into scripting, it's rarely an issue.

Simply having an appointment doesn't mean you close business right away, which is an unrealistic expectation many times. When the deal doesn't close you have to look back on why.

Is that producer well-trained in continuing the sales conversation? Is everything they were trained to do in cold call prospecting the same when you go out on an appointment? The differentiator in what callers do versus producers/closers do is that the goal is to get an appointment. It's a short conversation. There's no talk of budget.

Through ongoing training and coaching, the callers uncover more. They could find out who is involved in the decision-making process as part of upfront discovery.

They uncover pain points and keep detailed notes about the conversation, so that when you get to the appointment, the closers can feed off what they've learned from the callers, including resurrecting the pain points and how they have the solution.

This is important because buyers actually do want to hear from salespeople, with a caveat. According to a study by HubSpot, 71% want to hear to from reps when looking for way to improve their business, and 62% want to talk when trying to solve a business problem. This is why uncovering pain is so important.



The age-old question is... is it the appointment setter or the closer? Here's how to know for sure:

- Pre-qualification must be built into scripting.
- Determine the quality threshold.
- Define what a good appointment looks like.

Once this information is collected, it's up to the sales rep or closer to continue to probe to determine if there's enough "pain" during the time of the call. Ask on a scale of 1 to 10, 10 meaning I have to do this immediately, 1 meaning, we're fine, where would they rank themselves?

If it's anything less than an 8, the deal probably won't close right away. If it's a 5, it sounds like it could go either way. You don't want to spend the time and energy continuing the sales process at that time in a situation like that.

At that point, the prospect will be recycled to be revisited later. Ideally, the sales rep would have elicited information that will give them an idea of the best time to call. For example, with health insurance, that could be when their current plan is up for renewal and they are shopping around for their options.

You're on a call, and you're not going to convert it to an appointment. The prospect says, "Let me think it over." What's your response to that?

When some salespeople hear that, we call it "Hopeism." They think, "Oh great! Somebody is actually going to think about it." But the truth is that "let me think it over" means you haven't sold them completely. There's something missing, and you should address it there and then, so you won't continue to chase after a wrong or bad opportunity. The rule is to go for the no, fast.

Case Studies

At this point, I'd like to share how implementing the outbound prospecting, inside sales, and cold calling strategies and techniques in this book helped companies in a range of industries move the needle on different parts of the sales process.

The solutions are ideal in cases when you are having a difficult time managing your sales team and monitoring their efforts, producers are giving you poor quality leads that won't close, and you don't have the time to train your team yourself.

Case Study 1 – Senior Vice President of Sales with a Premier Insurance, Risk Management, and Financial Services Firm

This client had three sales producers who were not able to get enough first-time appointments from leads.

These three producers were young and trying to build a book of business. The issue: although they had been trained in cold call prospecting and were responsible for doing so on a regular basis... it just wasn't getting done.

They claimed they were making the cold calls. Yet, the evidence – very few appointments on their schedule – pointed to the contrary. But management didn't know for sure because they had no way to monitor their activity.

Another factor in the mix: there was a full-time appointment setter on staff with eight years of experience, but about half of the appointments were cancellations or no-shows. This telemarketer had never been given any training, and the client admitted candidly that this person was looked at as a commodity and was not really given guidance or support.

This client knew he needed to more actively manage these producers to make sure they made the prospecting calls and more closely watch the appointment setter's ef-

forts to account for the issues there, but he didn't have the time to do so.

We Bring in a Monitoring System to Increase Accountability

When my team and I came in, we worked as their inside sales engine. We first set up our recommended CRM to better track prospecting and sales efforts. It was immediately clear that despite their claims, the salespeople were not cold call prospecting when they were supposed to.

They were making about 10 calls per hour, instead of 20. The telemarketer was supposed to prospect 30 out of 37.5 hours a week and wasn't doing it consistently.

To address these issues, we:

- Provided the salespeople and appointment setter with new scripts.
- Held the telemarketer and sales producers accountable for hitting their goals and used the CRM to make sure they did.
- Met weekly for training, roleplaying different call scenarios, and to discuss challenges and "wins." We listened to actual calls and gave

feedback on how they could have handled the call differently to get better results.

- Gave one-on-one coaching in order to make sure each sales producer received training that addressed specific areas they needed to improve.

An integral part of the training, we established strict schedules for cold calling. And with the CRM in place, we were able to monitor their efforts and ensure that calls were getting done – and at the right times.

Our system works because it's based on numbers...and we make sure your CRM is tracking all the right numbers...automatically.



The Results – More Qualified Appointments and More Sales

As a result of our efforts, this Senior VP of Sales is able to better manage his team, thanks to a CRM that allows him to track what is actually being done. The

CRM holds the sales producers and appointment setter accountable. In fact, the company moved the whole sales team to the CRM tool soon after.

It's not surprising with results like these:

- The quality of appointments improved because we trained the telemarketer to uncover pain. Previously, he would only set a date and time and gather no more information.
- The number of appointment cancellations was reduced significantly.
- The number of qualified appointments increased. And the producer was able to hit the monthly goal of eight appointments. In fact, he was able to meet that goal in January despite being out of the office for two weeks.
- Producers gave more positive feedback on the appointments they took, leading to more sales.

Not only that, but with his salespeople setting more qualified appointments thanks to the new scripts, training, and monitoring system, the Senior VP of Sales was able to attend more appointments in-person with his producers, leading to better closing rates.

Overall, they closed significantly much more business than they had before they implemented our system.

Case Study 2 – Sales Training Franchise Owner

With this client, we focused on helping an individual sales associate. She was networking inconsistently and struggled to set appointments. Plus, there was no cadence to her outreach. In fact, after 10 months she had no meaningful business connections in the community and just could not set up appointments consistently.

This associate had previously been successful in corporate sales, which has a longer sales cycle, but wasn't able to make headway in this new position. After meeting with her, we realized a major problem is that she had not been properly trained in cold call prospecting.

We Implement Training and Monitoring

To get the associate up to speed we brought in a thorough training program that:

- Helped her develop her skills.
- Worked on her scripting.
- Increased her confidence, which had taken a hit after nearly a year of poor performance.

- Implemented our CRM, with dashboards the owner could use to monitor key metrics of her performance.
- Monitored her efforts and progress.
- Met weekly to discuss challenges she was facing and resolve issues.

The Results – More Appointments in One Month Than the Previous 10

The training started in December, which, as you know is viewed to be a very tough time to set appointments because of the holidays. Despite this challenging environment, the associate set 11 appointments, which was more than she had set in her first 10 months with the company.

In the first quarter of the following year, she set 25 qualified first-time appointments, which exceeded the owner's expectations.

It turns out that this sales associate had a natural talent for sales but just needed some training, support, and structure to bring it out.

Importantly, by working with her closely, we gave her the confidence she needed to take her work to the next

level, which is key in a field where you hear “no” so much.

Case Study 3 – Large Employee Benefits Corporation in Chicago

This client needed help getting a handle on their poorly run inside sales call center and properly use their CRM tool. It’s actually the one we recommend VanillaSoft. However, they were not using it to its full potential – and hadn’t been for 10 years. Adding to the problem: they had gone through five sales managers as they tried to get their sales monitoring under control.

The client also felt that the CRM was managing them, instead of helping them manage 80,000+ leads. When we dug deeper, we discovered the software had been set up incorrectly, and their database was very disorganized.

In particular, they had not set up a dashboard to monitor their KPIs– so the managers had no clue what any of the team was doing. To make matters worse, there was no organization or assignment of leads. As a result, follow up was not being done; leads were slipping through the cracks.

Callers were taking advantage of the disorganization to manipulate the system so they could choose which leads they were going to call.

Why is this a problem? When you have a targeted lead list and let callers cherry pick who to contact because they make an assumption as to whether or not they are viable, that can lead to missed opportunities.

In one case, after re-contacting a lead after two years of no calls, we discovered that one lead had actually been looking to make a change but had moved to a competitor a year before.

Simply put, you always want to be in front of prospects if you have defined them as your target.

Plus, because of this disorganization, lack of training, and poor monitoring, there was significant turnover in inside sales reps.

There was another fundamental problem with this client's sales process. In this company, sales producers were hired with the promise that they did not have to do any prospecting. The inside sales team would put appointments on their calendar.

If the appointment is with a decision-maker and they are actively seeking a solution, it's no problem. However, appointments were being set with little or no pain. The producers were wasting their time.

In this industry, employee benefits, the reality in appointment setting is that companies don't want to talk about insurance until they have to. So, to get an introduction too long before a renewal date is slim to nil.

To account for this, we set up the system with intellectual routing. We put leads on a caller's queue three months before the renewal date, six months for a large account, when these companies start looking at benefits options.

We Make Their CRM Usable to Improve Monitoring, Follow Up, and More

This was a big problem, with a lot of moving parts. We put together a comprehensive plan to get them back on track with setting appointments, following up with leads, and closing sales.

As part of that effort, we:

- Cleaned up their database.

- Established KPIs for the team.
- Created a dashboard to track and monitor the team based on the new KPIs.
- Set up a system to track and route leads to the right callers.
- Trained the staff in how to use the improved CRM.
- Revised scripts for more effective calls.
- Showed them how to use the CRM's productivity tools, including a Voicemail Drop feature that allows callers to use a pre-recorded message (which we scripted) when they encountered voicemail.

A key part of our work was to streamline their call process. Previously, calling was done randomly, and they were not recycling leads. We put together a system that routed leads from initial call to appointment setting to sales close. And there is now a plan to recycle leads that don't close.

We also made sure that callers could not skip certain calls. And they couldn't choose to make calls outside their own team.

During the implementation phase, we met huge resistance from the sales team. Not surprisingly, they liked the old way of doing things. Getting them to agree to follow our recommendations was like pulling a wisdom tooth without Novocain.

After setting up the CRM properly, we told the salespeople we expected 20 dials per hour. But after looking at the dashboard, we could see the sales manager was averaging four dials an hour. Four! Which meant he was not doing his job, in favor of too much research, or combing through the database, or whatever else.

Our monitoring also allowed us to see that their inside sales reps were not properly using the new scripts we had provided. Specifically, they were not asking enough relevant questions to make qualified appointments.

However, with further training, including roleplaying different sales call scenarios, we were able to get the associates back on track.

At the heart of all of this was a fundamental mistake many companies make. They believe that simply installing a CRM solves your sales problems. But if it's not set up or used correctly, you will definitely not get the

results you expect and could actually be sabotaging your efforts.

To make matters worse, although they had a CRM, albeit using it incorrectly, they actually were using an Excel spreadsheet, with each producer having a page, to track everything manually. And even that wasn't been done right. The sales manager was responsible for updating this running list of appointments throughout the year but was not completing the task.

The Results – More Qualified Appointments

Of course, one of our first recommendations was to automate reporting in VanillaSoft. Doing so, and no longer having the sales manager compiling that information by hand on a spreadsheet, helped save an estimated three weeks in lost productivity per year. Time the person in that position can now use to make sales.

This client is very numbers driven. And they set strict standards. Members of the inside sales team must make one appointment their first month on the job, four appointments in month two, and eight in month three – to keep their job and become full time. Only two salespeople survived. Despite the setbacks, the department did set 37 appointments in January, before the pandemic hit.

Case Study 4 – Regional Independent Insurance Agency

For this client, we were first brought in to set appointments for principals because they were not prospecting. Then they wanted to change tactics and teach their three young sales producers, who were very inexperienced in prospecting and had no book of business. They were working outside sales but switched to inside sales due to the pandemic.

They had no scripting, no consistent messaging. They were expected to prospect three days a week, two hours each day, which was not enough.

Writing Their Sales Playbook

For this client, we're providing full cycle sales coaching and developing a sales playbook for them that covers how they set first-time appointments and what they should say in the first-time meeting.

We've had to break some bad habits – like providing quotes for any lead that asks for it, without doing any pre-qualifying.

The Results – “Green” Producers Are Now Writing Business From Appointments They've Set

The three young producers have taken to our training and are learning. Enough so that they are writing business. These are young producers, so these aren't big deals... yet.

But they are closing around 20% off of cold call prospecting.

The client is very satisfied with the progress so far as these producers learn the ropes of inside sales.

Outsourcing Sales Management to Specialists

Most sales leaders hate cold calling themselves. They believe it doesn't work for them, that it hasn't worked in the past. In that case, with these preconceived notions, it will be difficult for them to manage a team making cold calls.

Managing an inside sales team requires a lot of stroking. You want to build a really positive, sales-enriched environment, which encourages the callers to keep going when they've heard "No's" all day long.

You don't have to love doing cold calls, but it's your job to do it. You don't have to do it on your own. You don't have to implement this or manage this internally.

That's the benefit of working with an organization like us. We love cold calling. We know how to do it correctly. We know the proper cadence for follow up.

With our Call Center in a Box, we act as your virtual sales manager, managing your inside sales team. Through working with us, your own team is going to grow their skills and improve results.

We have the management and continual training systems in place. We have years of experience developing scripts that work. We have top-of-the-line software that makes the team very efficient and automatically tracks all the right KPIs, so you always know how it's working.

You quickly know who the performers are and who's not performing, so you can plan in advance to make changes like hiring a replacement.

Your target audience will be contacted by professionally trained salespeople – your own salespeople who are setting appointments but also uncovering pain points your producers can leverage in their calls.

Ultimately, what happens is that **you'll have a continuous supply of qualified appointments.**

Over time, the more touches each prospect receives, you will be top of mind to your target audience, and you'll enjoy more sales.

We bring a lot of experience to the table, and we do it all virtually, which is also a cost savings. There is no overhead for office space, equipment, connectivity, etc.

This is not the outsourcing you may have done in the past to a call center overseas where communication was a problem or where you got plenty of appointments, but they weren't qualified. We teach *your* team to set appointments and at the same time provide a synopsis of the conversation – including pain points – so your outside sales team is prepared for the appointment.

When you have us step in and help you manage your sales team, it's going to be done professionally. We'll create conversational scripts that ensure your callers don't sound like any other salesperson your prospects have heard from, and continually coach them on the scripts, the right voice tonality, and the proper calling cadence to produce bankable results for you.

The bottom line...you'll have more conversations with qualified prospects, you'll take your inside sales team to even higher levels of performance and have a clear picture, based on the numbers, of how it's working.

Let's work together...
you'll have more conversations with
qualified prospects.
What are you waiting for?



The best part: we set it all up, manage your team,
train your team, and build the tracking systems for you.

To find out more, call us at (908) 879-1322 or email
me directly at Nancy@OneOfAKindSales.com



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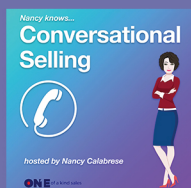
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