



WMU Sales Challenge

The Premier High School Sales Curriculum & Competition



WESTERN MICHIGAN UNIVERSITY
Haworth College of Business
Sales and Business Marketing



wmusaleschallenge.com

Phone Call Preparation Cheat Sheet

FIRST THOUGHT

While there is a suggested script for making an appointment setting phone call, the goal is to be a human being having a conversation with another human. NEVER lose sight of this. Failure starts as soon as your approach (voice tone, words, pace, etc.) becomes you giving your “spiel” at the prospect. If everything works out the long-term goal is a mutually beneficial relationship and as SBM trained salespeople we ALWAYS keep that long-term relationship in mind and thus behave in a relationship enhancing way from the beginning. The interaction is an assertive conversation facilitated by you.... Let’s review.....

- **Assertive:** If the other party was currently shopping for new solutions they would have called you. But that didn’t happen, and that’s OK. The reality is that you sell a product connected to this prospect’s business needs. Thus, you are not a random telemarketer, you are a business professional suggesting that this prospect take a moment and reconsider a business decision and consider if your company’s capabilities might be a better fit for their business challenges. However, to get this process started you often have to break the natural inertia (bodies at rest, stay at rest) and push smartly to get things started. Many “best customers” started this way and ultimately it is how business gets done. Thus, be smartly assertive in your approach.
- **Conversation:** It is not a pitch or spiel, it is a conversation between two business professionals. So, treat it like a conversation. Good conversations are two-way, and the focus is on the buyer’s challenges and situation. Invite the buyer into the conversation and steer that conversation to a productive (and quick) focus on the buyer. In the end you will ask for the appointment if the match sounds like it has potential, but don’t be so focused on that task that you fail to engage in a human to human conversation.
- **Facilitated:** You called them, and you are the one that ultimately wants to ask them for an appointment. So, it becomes your job to facilitate (to make easy) the conversation. This means moving the conversation from point to point smoothly and keeping both of you on the same page. It does NOT mean dominating the conversation. The content of the conversation should come from both parties, but the process and flow of the conversation is entirely your responsibility.
- **By YOU:** You are you, and you are different from others. That is OK. Be you. Yes, we are using a basic structure and script, but that script should never be a memorized script robotically delivered. The script is a guide to ensure you have a productive interaction, but you need to take the script and find a rhythm, flow, and final wording that reflects you. If two humans are supposed to be having a conversation the one initiating it needs to be themselves. Just like two different actors playing the same scripted role will give the role a different feel, so should two different salespeople using the script below come across as genuine but different.

The Call Outline

The STAGE	The Concept	Example Wording*
Personal Intro & Human Connection	It is a conversation between two business professionals, so slowly and clearly introduce yourself and connect in some way with the other human!	<i>Hi, this is Jim Eckert from Crystal Mountain Resort. I am sorry for the interruption, but I was hoping I could borrow just a couple minutes of your time. Is that OK?</i>
Business Intro & Value Hook	Introduce your company and add depth to who your company is and offer the one or two best value points you can provide to this particular target. This generally requires that you have done some basic research on the organization you are calling so you can best deliver a value message that is well matched to this organization.	<i>Crystal Mountain Resort is a full service resort in Thompsonville, MI that specializes in helping organizations host productive and successful events. We are a very family-like organization and this has made our resort a great option for non-profit organizations like yourselves that wish to have events that really resonate with their members</i>
One Big Question	It is time to get the other party involved and you do so by asking one big question, followed by digging connected to their answer. The big question should flow from the research you did related to the target and what opportunities you identified that intersect with what you do. The idea is NOT to start telling them about how great CMR is, but to find out what are the challenges and needs that are on the top of their mind. With a first big question you can DIG with follow-up questions. You are looking for 1-2 points you can connect to.	<i>I noticed the MME does an annual conference and a few other educational events each year, so I am curious (Lots of possibilities here) What's the best event you have ever had? What defines a perfect meeting for the MME? What's the one thing you would seek to improve as you plan next year's meetings? As the person who organizes the meetings, what the most important thing you look for in a potential host site? (answer.....) Can you tell me more..... (Dig until you have 1-2 key needs)</i>
The Connection	Take what you learned and in a tailored way, connect this prospect's needs / challenges back to what you sell. Do so in a brief and direct way with the idea that you are letting them know that you have capabilities related to their challenges and thus it makes sense to schedule a meeting. NOTE: this might also be the point where you determine that the fit between the organizations is too poor to warrant a meeting.	<i>Thanks for sharing that with me. I am actually excited to hear that a meeting that has lots of room for breakout sessions and that ultimately feels like a treat for your members are key. At Crystal Mountain we have our Crystal Center conference facility that is specifically designed to handle a break-out oriented event and one of our core values is talking a holistic approach to the events we host, including creating a "this is a treat" atmosphere for all of our guests.</i>
Meeting Request	Roll from the connection into suggesting that based off of this preliminary fit, it makes sense to keep the conversation going. Suggest a specific meeting that includes the day – date – time – length of the suggested meeting. THEN BE QUIET and wait for response!	<i>With this connection in mind I would love to keep the conversation going and take a deeper look at your organization's needs and work together to see if Crystal Mountain would be a good solution for you. I will be in your area soon, so would we be able to meet Tuesday, November 6 at 3pm for about 30 minutes?</i>

<p>Deal with Objections</p> <p><u>Note:</u> The exact words the buyer uses might often be different (e.g. “send me a web link” vs. “send me the brochure”) but the idea is the same. Be in listening mode and you should have no trouble identifying which objection is being expressed even if the words used are not the exact titles of these objections.</p>	<p>There are many possible push-backs you might get here. The key is to recognize they are not objecting to your product but are instead objecting to the meeting. So, deal with their issue in a smartly assertive and tailored way and roll back around to selling the meeting.</p> <p>The sections below deal just with the objections that will be in play for the Great Lakes High School Sales Challenge.</p>
	<p>BROCHURE – They request more information in lieu of an actual meeting. This is often mainly a blow-off. It often represents someone who just isn’t ready to commit to a meeting (remember they were not expecting your call and you have them a bit frazzled by asking for a meeting). So your approach is to basically blow-off the blow-off and remind them that a meeting is a productive next step</p> <p><i>I will definitely follow-up with more information, however it is often more productive to sit down together and really dial in your key challenges. From their I can offer the guided tour of Crystal’s capabilities to zero in on what really matters. In addition, it is rare that you wouldn’t have questions, and with us together we can work through those efficiently, so can we get together on Tuesday, November 6 for 30 minutes at 3pm?</i></p>
	<p>HAPPY / NO NEED – Again, if this person / organization was actively in buying mode they might have called you. In this case DO NOT tell them they are wrong to be happy or that they should have a need, simply suggest that there are possibilities to explore, and that many previous customers are glad that in the end they made the move to have the first meeting. The basic form here is known as the FEEL-FELT-FOUND response.</p> <p><i>I appreciate your situation, and I know you weren’t out looking for new solutions. But the reality has been that this was the case with many of Crystal’s most loyal customers. They too were hesitant to meet, but after doing so and seeing what Crystal could do on their behalf, they ended up glad they made the commitment to the first meeting. It turned out to be a great first step and I would love to make that first step with you. So, could we get together on that Tuesday, November 6 at 3pm for 30 minutes?</i></p>
	<p>NO TIME – People are busy, and the idea of another meeting and another project is often unwelcome. The idea here is to once again stress the potential value outcome and the fact that the path to that outcome starts with a first meeting</p> <p><i>I totally understand a busy schedule, however the idea is to focus on helping the MME have the best possible meeting and the first step on that journey is to carve out some time to meet, so can we commit to that 30 minute meeting on Tuesday, November 6th at 3pm?</i></p>
<p>Finalize & Close</p>	<p>Take the time to make a final confirmation and thank them for their time and briefly express your excitement about the meeting them and helping them.</p> <p><u>The Calendar Invite</u> – In the current world the finalization of meetings is often done via a calendar invite via Outlook or Google. This is basically an email that invites the other person to accept the meeting and then automatically puts the meeting on both calendars.</p> <p><i>Great, I will send you a calendar invite to lock things down for Tuesday, November 6 at 3pm. Is chris.miller@highschool.edu the correct email address? Great. I would be grateful if you could respond to the invite promptly so we can lock down the meeting on both of our calendars. Does that work?</i></p> <p><i>Well I will let you get back to what you do, but thank you for the meeting, I am excited about speaking to you about your meeting needs and how Crystal might be able to help you host the best meetings you have ever had. Thanks again and I will see you next week!</i></p>

FINAL THOUGHTS

Below are some “Best Practices” that have helped the Sales & Business Marketing students at WMU perform at their best. They should also help you.

- **INTERNALIZE, DON'T MEMORIZE:** When you read a memorized script, you sound memorized. It is easy to hear that in someone's voice. So while you might want to work on specific wording that you are comfortable with, recognize to perform at your best, the best approach is to internalize the information so that the key message comes out even if you use slightly different words each time you deliver it. As an example, when you have internalized the idea of using the FEEL-FELT-FOUND model to respond to the “no need / not interested” objection, then you tend to deliver it with a confidence and a strength that won't be the case when you robotically deliver a fully scripted, basically read, set of words.
- **MAKE CHEAT CARDS:** To help you be confident in your objection responses, make key word cheat cards (4 x 6 index cards work great here). Then when the buyer says “send me the brochure” you can quickly look at your cheat card and have a visual support (NOT a script) that will help you deliver a message that is on-target and confidently delivered. For these cards, don't write a script on them, instead, write the key words that will remind you to deliver the message you have crafted and internalized. When you practice, use these cards, not a full-word script to get good at having the message internalized versus mechanically memorized.

We are excited about receiving your phone calls for the Great Lakes High School Sales Competition. We promise we will make it difficult enough that the best will rise to the top, but at the same time we fully appreciate that you are in learning mode and our students won't play mean or rude customers, just busy professionals that need a bit of smart pushing to get to the point of agreeing to a meeting. We are confident you can do that, and it will be a privilege to be part of that experience with you!

FEEDBACK – As you wrap up your call, don't exit the call! Stay on the line and our SBM Student will offer some feedback and help you lock in the learning experience. Feel free to ask them any questions and regardless of the outcome of the call, gain experience and knowledge for the future!

NOTE: We will be using Zoom to execute the phone calls. We will adjust the settings in Zoom to keep camera's off and thus it will function like a phone call. However, when you are done with the role-play, you are encouraged to turn your camera on for the feedback part of the interaction. We have used this process in our Sales Program at WMU and while it sounds funny to use a video call platform for a phone call, it works well! You can use Zoom from both a computer and a phone, so it gives you flexibility for “calling in.”