

Guide to calling customers – The Introduction

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Before you call

- Be clear about why you are calling, what you want to achieve
- Have the right mindset
 - I have something I believe will help you / help your business
 - I'm calling to understand if it is suitable and a good fit
 - If not – no problem, thank you
 - If it is – I will provide more info / book an appointment / provide the product
- WRITE it down. Take a minute before you call, to write down what you are going to say, based on the guide below.

Tips

- Minimise distractions. Find a quiet space.
- Speak clearly and slowly (much slower than you think you should)
- Be honest. Don't try to trick people about why you are calling, then surprise them at the end. You will instantly lose trust.

The call

Introduce yourself and company.

Who are you, where are you calling from.

Interest Statement.

Use one or two sentences to describe what do you do / provide that may help them solve a problem or improve their life/work/wellbeing?

"Hi this is Peter from Learning Elements, we help people feel confident and comfortable about conversations with their customers"

Purpose.

Why are you calling? What is the objective / goal.

Eg. Book an appointment, send further information, offer them a product... etc

"I'm calling to understand if there is value in meeting next week to review your customer conversations and see if there is an opportunity to increase revenue while improving customer and staff satisfaction. To do that, I just wanted to ask a couple of questions. Is that OK?"



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