

Sales Tools/Pre-Call Planning/Prospecting

You may have heard the saying “people don’t plan to fail they fail to plan”. Top sales associates take a few minutes to prepare before their prospecting activity. They also set up their work area and have job aids and voicemail scripts ready. This is important, because when you get a “hot” prospect on the phone you want to be ready. When a sales associate is properly prepared, it allows them to be on the phone and have the highest probability of success.

Below is a call preparation checklist that you may go through before you begin to prospect. Prior to making calls, you want to make sure you are ready for anything that might come up.

CALL PREPARATION CHECK LIST

- ___ Keep your desk and work area clean and free of distractions
- ___ Review the companies and people you are going to be calling
- ___ Be ready to take notes
- ___ Don’t pre-judge the call before you let them tell the whole story
- ___ Be ready to communicate the purpose and benefit statement for the call
- ___ Be ready to handle objections that you anticipate the prospect having
- ___ Be prepared to present a couple of different options for the prospect
- ___ Have all materials ready and be prepared to talk about competitors
- ___ Be ready to share a few features and benefits of Impac with the prospect
- ___ Have one or two options ready depending on the prospect’s situation
- ___ Have a customized voicemail ready