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# The Recipe for the Perfect Sales Call

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**Abstract:** Sales calls are an essential part of any sales process as the beginning of the sales pipeline for any business. A sales call is an opportunity to connect with prospects, understand their needs and challenges, and offer solutions to help them achieve their goals.

Salespeople need to make a good impression during the first sales call to ensure a strong start to the sale. This document offers the perfect recipe for a successful sales call.

In this document, you will have detailed knowledge on how to make phone calls, how to deal with people, especially women, how people respond to your calls, and a new technique that I have created myself for making successful calls, and will help you not sound like a normal sales person call for your customer so you don't have to hold the phone. I took advantage of this and made over 50 successful calls out of 331 during my internship at a financial consulting firm.

**Objective:** The main objective of this document is to help freshers make a successful sales call. This document contains some techniques that will help any beginner to make a sales call.

**Keyword:** Sales call, cold call, prospecting call, feedback call, follow-up call,

## I. INTRODUCTION

According to a recent study, 48% of all sales professionals fear cold sales calls and 53% give up too easily. However, sales calls, whether cold or warm, are vital to business growth. What's more, potential buyers want to hear from you. 71% of buyers want to hear new ideas from you to drive growth.

So how do you start a productive, professional conversation? Sure, you need a strong opening that warms people up and builds trust right from the start. But to make sure you don't come off as a "difficult sales rep," your work should start before you pick up the phone.

### A. What is a Sales call?

Sales calls are conversations between a seller and a buyer, often called a lead or prospect. Sales conversations can take place in several settings such as social media, email, live chat, phone calls, and video calls.

The ultimate goal of every sales call is to convert a prospect into a paying customer, or at least move them further through the sales funnel. The main purpose of a sales call is to better connect with potential customers and inform them about your brand's products or services.

### B. Types of Sales Calls

There are 7 types of sales calls that reps make during the sales process.

- 1) Cold calling
- 2) Warm calls
- 3) Prospecting sales calls
- 4) Sales meetings / Sales-appointment call
- 5) Follow-up calls
- 6) Service calls
- 7) Product Triggered Sales Calls

Cold call	•Cold calling is basically contacting potential customers without any prior contact or relationship
Warm call	•Sales professional connects with a prospect, who has already shown some interest
Prospecting sales call	•Prospecting means seeking out the right customer to pitch
Sales appointment call	•IT is made to finally have an open discussion on the prospect's stress points and how the brand can help solve them
Follow-up-call	•These call are made to the potential prospects to know about their decision regarding the purchase
Service call	•A service call is conducted after the deal is closed
Product Launched sales call	•These sales calls happen between a company's sales rep and an existing customer to inform new product/services launched

## II. PURPOSE OF DIFFERENT TYPES OF SALES CALLS

### A. Cold calling

E.g.: Solicitations by credit card companies to sell cards to random people.

#### Purpose of Cold Calls

Cold calling is usually done to find out a prospect's interests and whether or not they align with what your brand offers. Based on this, you can engage and engage them. Qualifying a potential customer is therefore much easier.

### B. Warm Calls

An example is when someone met you at a seminar, expressed interest in your brand, and asked you to call the coming weekend. Now you would warmly call to confirm their interest in your brand.

#### Purpose Of Warm Calls

The purpose of warm calls is to attract a prospect to your product/service and influence them to make a purchase. If not a conversion, persuading them to a demo or a one-on-one sales meeting can be one of the show's warm calls.

### C. Searching for Sales Calls

Understand better with a quote from Michael Phelan.

"Prospecting means finding the right customer to pitch to; it requires research and intelligence. Cold calling is a blunt sales tactic to randomly call potential buyers in the hope that many of them may be in buying mode."

Purpose of search calls

To get your audience interested in your product/service, convince them that you can solve their problems.

### D. Sales Meetings

For example, a potential customer is looking for a CRM for their financial advisory business. He was talking to a software company for a month. And then he took a 15-day free trial of the CRM software. After the free trial, the prospect was called into a sales meeting to further discuss the purchase or to ask any questions.

Purpose Of Sales Meetings

The purpose is to show them the features and benefits of your product/service. This way, you will be one step ahead in closing the deal.

### E. Follow-up Calls

Purpose of follow-up calls

The purpose of follow-up calls is to identify the lead's position in the sales process. Remember that the follow-up call is not just for the decision-making phase. Sometimes follow-up calls are also required during the consideration phase.

### F. Service Calls

A service call is made after the trade is closed. You can call it a follow-up call after the purchase.

Purpose of service calls

The aim is to ask if they are facing any problems or how they feel about the product/service.

### G. Product Triggered Sales Calls

A traditional sales call is easy because you are dealing with an existing customer. In product launch sales calls, the salesperson plans to ask about the customer's needs or offer a solution to close the deal.

The Purpose of the call to market the product

Introduce new products/services to an existing customer and identify opportunities to meet customer requirements.

### H. Feedback method (I developed this Method)

So, the feedback method works with the psychology of people. People like to express their opinion about anything. When you ask your customer for their feedback, they are happy to give it to you because they feel the company values their opinion. Thus, this method includes the customer's opinion and the ability to remember. Most of us don't remember what we did in the last two or three days or what we ate in the last two or three days. And this helps a lot in convincing the customer.

How the feedback method works

Again, I'll use my previous example of selling mutual funds.

This technique is basically to make the customer comfortable and confuse him by saying that "XYZ called you sir/mam and told you about the scheme/fund". Then the answer from the customer would be "NO" because no such call was made to the customer by you or your colleague. You can then say to the customer, "If you give me a minute, I can explain or tell you about the scheme".

Here the customer can say yes or no. If he says YES, explain and you have a client with a 50-60% expectation that they can invest in it.

## III. PRELIMINARY PREPARATION FOR A SALES CALL:

- 1) *Research Your Prospects:* Using CRM and behavioural analytics platforms, you can get detailed information about your contact.
- 2) *Master your Product Knowledge:* Develop a deep understanding of your product or service so you can succinctly articulate its unique value proposition
- 3) *Outline the Most Likely sore Spots:* By taking the time to outline their likely pain points, you will be better able to speak to their needs during the call. While surprise does

- 4) *Describe the Benefits of your Product or Service:* If you've done any sales training in the past, you've probably heard people talk about features versus benefits. While it sounds impressive when you say your product or service has a specific feature, make sure you have a list of why each feature is important.
- 5) *Identify Their Likely Objections:* Overcoming objections is one of the most important skills for any salesperson. Most objections fall into one of four categories: budget, trust, need, and urgency. However, the specifics depend entirely on your product or service and their business
- 6) *Create Custom Presentations for Each Prospect:* Even if your presentation is almost identical from client to client, create a presentation that uses their name and company logo where possible to give it a personalized feel.

#### IV. HOW TO MAKE A SALES CALL?

These are some of the steps that will help any beginner INTENT to make the right sales call. When you call, try to get the front person to say yes to your question enough times, so that when you ask them to buy the product, they say yes, they will buy the product from you.

Remember, you should always have a smile on your face before making a call. It boosts your morale and gives you support along with keeping your phone and network fully charged.

Here is my example where I sold XYZ mutual fund to my customers.

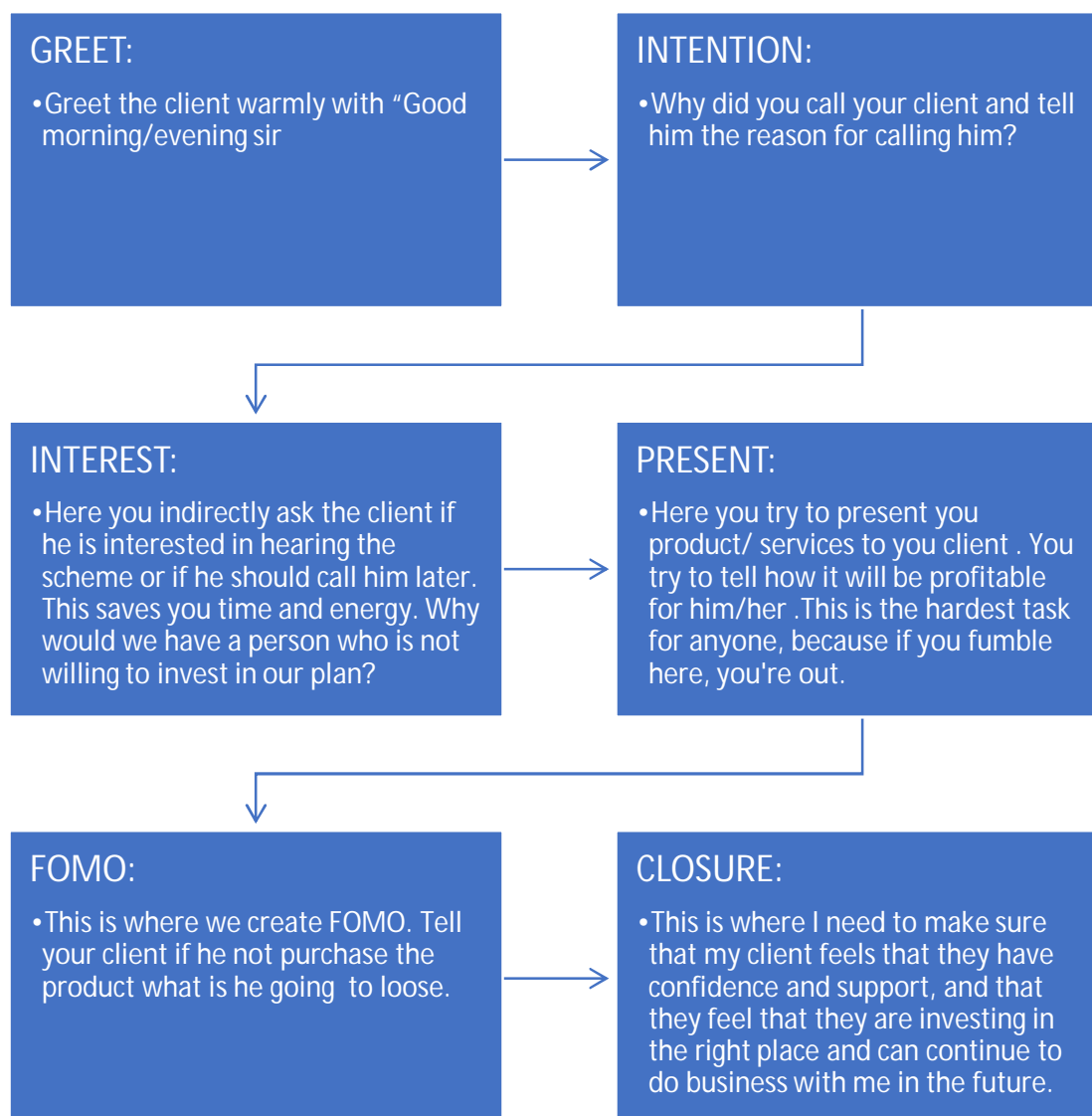


Fig.; Mechanism of proper sale call





#### A. Greet

Greet the client warmly with “Good morning/evening sir” or “Sir Namaskar”.

#### B. Intention

Why did you call your client and tell him the reason for calling him?

In my case "Sir I have called you to tell you about a scheme or fund which has high growth Potential with less risk".

#### C. Interest

Here you indirectly ask the client if he is interested in hearing the scheme or if he should call him later. This saves you time and energy. Why would we have a person who is not willing to invest in our plan?

So you can ask "The client is ready to spend 1 minute listening to the scheme and say that it will only take 1 minute to explain the scheme". I have to say all this in Marathi and tell the client.

#### D. Present

This is the hardest task for anyone, because if you fumble here, you're out.

Here you can say “Sir, in this scheme we invest your money in large, mid and small caps. Companies like IDBI Bank, HDFC Bank, RIL etc. Sir, your investment will be done as per SEBI rules and regulations. That's 25% in large, medium and small. The remaining 25% will be invested according to the market situation by the fund manager or expert. Sir if you invest your money in LUMPSUM say 100000 rupees after 5 years you will have 190000 Rs. And if you start a SIP of Rs 10,000 after 15 years, you have a return of 90 crores. And after the 2023 budget, your profit is expected to increase and after the 2024 election, you will have more profit due to the rising market.”

**Wait here, whoever speaks first loses the game.**

Then he might say, "Sir, I will tell you later, or he will tell you what you suggest, or I have already invested before"

Here you can say, "We recommend our client to invest in SIP because of the upside and downside of the market, so you can make a huge profit at the end of your tenure."

#### E. FOMO

Try telling your client if they say no, what will they lose?

Tell him “Sir, since NFO (New Fund Offer) is going on, you will have it at 10 NAV”.

This is where we create FOMO. Client says ok I will go for SIP XYZ rupees”

#### F. Closure

This is where I need to make sure that my client feels that they have confidence and support, and that they feel that they are investing in the right place and can continue to do business with me in the future.

So here you can say "Sir, trust me once sir, I can assure you that your scheme will return well", then it will automatically say ok and either start SIP or do LUMPSUM. And at the end you can “Thank you sir and welcome to XYZ group or MUTUAL FUNDS and have a good day sir”.

It also helped me a lot during my internship but it was not very effective in terms of customer convenience because most of the time they kept the phone after answering the call for the customer to buy the product. So, after that I changed my strategy and created my method which I call "Feedback Method".

## V. RESEARCH METHODOLOGY

#### A. Primary data

The contact of customer were provide to me by an financial advisor firm during my internship and also some of the customer contact was provide by banks in order to sell the credit card, mutual funds and insurance.

##### 1) Financial firm

- No. of customer called =441
- Successful calls=52

## 2) Banks

- No. of customer call= 78
- Successful call= 23

Other source

1. Questionnaire
2. Podcast
3. Observation

**B. Secondary data**

The secondary data for the research paper was from the blogs of success people and youtube were major source.

Other source

- 1) Newspaper
- 2) Magazine
- 3) Movies

**VI. LIMITATION DURING RESEARCH**

- 1) People had lost their job so were not interest in listening about the product.
- 2) Some of the times people over reacted and thought of fraud call or spam call.
- 3) Saving all the numbers in a single phone was a major problem as after having 50 call the battery use to get drain.
- 4) People use to show interest but they use to take lot of time and started to tell their story and experience.
- 5) Some of the times prediction made by you, are not up to the point in the call or the person is trying to check your patient.

**VII. FINDING AND SUGGESTION IN SALES CALL**

- 1) Try to ask questions to your customer to help him communicate well during the call and listen carefully to whatever you say to the customer.
- 2) Try to ask a question that gets your customer to say "YES" as many times as possible. This will help you put the customer at ease during the call.
- 3) Always record the call and review it.
- 4) Always have a smile on your face, you will talk to the customers, which will show your customer that the seller himself is very confident about his product.
- 5) When dealing with women, tell them the profit they would make or the benefits of using the product. In my case, when I used to sell Mutual Funds, I used to tell the ladies the profit they earn by investing a small amount every month. Then they used to show interest. If you suggest directly to them, they will listen to your opinion and then say that their son or husband took care of it and then hang up.
- 6) Practice, practice and practice. The more you practice your script, the more you will be able to sell the product.
- 7) After 100 calls you will be able to predict how the person will answer or react.
- 8) Whatever happens during the call, you have to be polite and respect the person because he can give you a lot later. And you have to keep your customers at all costs.
- 9) This is the most important thing; whatever you sell over the phone you have to be realistic and genuine because the customer's trust is the most important thing. Once trust is broken, he will never come back and pick up your call. And thanks to this, you will also be your customer.

**VIII. FUTURE SCOPE****A. Sales Representative**

Sales representatives typically work under the guidance of a sales manager and focus on meeting sales targets.

**B. Inside Sales Representative**

Inside sales representatives conduct sales calls and meetings remotely, often using phone calls, emails etc. They may also be responsible for managing existing accounts and nurturing client relationships.

### C. Account Executive

Account executives focus on acquiring new clients and managing relationships with key accounts.

### D. Sales Manager

Sales managers oversee a team of sales representatives and are responsible for setting sales targets, developing sales strategies, etc with their team.

### E. Sales Trainer

Sales trainers are responsible for designing and delivering training programs to sales teams, focusing on improving sales techniques, product knowledge, and customer relationship management skills.

## IX. CONCLUSION

Sales calls allow you to introduce your product/service/brand to your potential customers. You must understand all types of sales calls. You need to understand what your prospects want to discuss in each type of sales call. Sales calls, whether cold or warm, are vital to business growth. Sales calls can take place in a variety of environments and the ultimate goal is to turn a prospect into a paying customer. There are seven types of sales calls, including cold calls, warm calls, prospecting calls, sales meeting calls, follow-up calls, and product sales calls. Cold calling is used to identify a prospect's interests and convert them into a possible business lead. Warm phone calls are made to entice potential customers to buy and convince them to attend a demo event or face-to-face sales meeting. The purpose of each call is to build interest among the listening prospect about the product/services.

Whether an inbound or outbound sales call, thorough research, pre-preparation, tactics, tools, etc., are required. And, if all is done correctly, closing more deals and meeting sales quota won't be challenging anymore.

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