



Guardian U

Telephone Prospecting Playbook

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Important

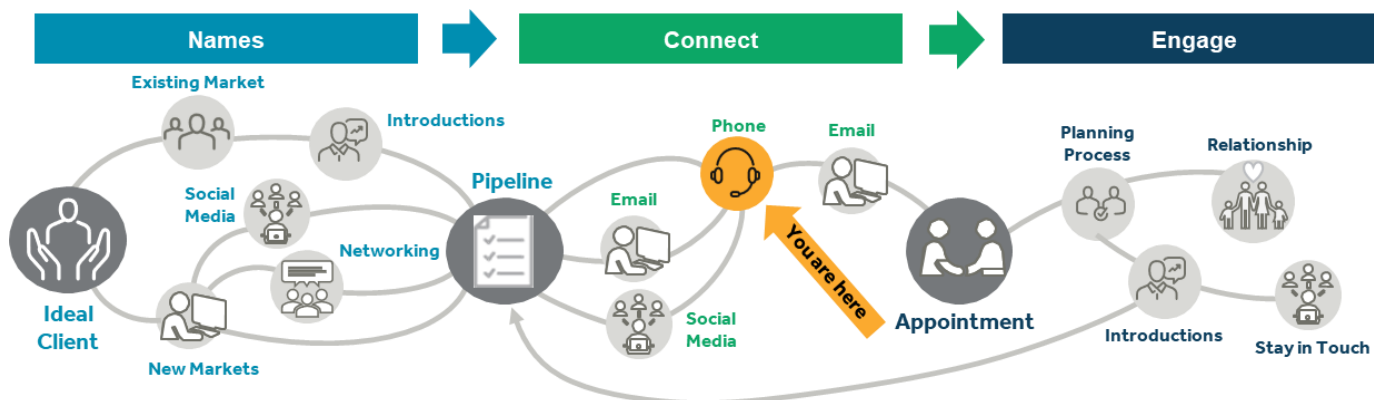
Examples of client communications shown in this Playbook are provided as illustrations only. You must submit client letters, etc. through PinPoint to the Advertising Review Unit for review and approval prior to use.

Content in this Playbook is excerpted from the book ***Fanatical Prospecting***, by Jeb Blount. John Wiley & Sons, Inc., Hoboken, New Jersey, 2015. Content used with permission of the author.

Prospecting Mindset

Your Client Acquisition Journey

Client acquisition is a process that begins by **acquiring names** of potential clients, **connecting** with those contacts and eventually **engaging** to develop lasting relationships. This playbook explores the role of telephone prospecting in that process.

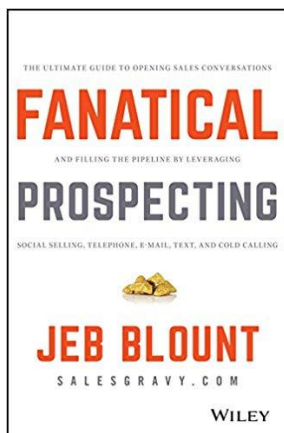


A Key Part of Your Prospecting Strategy

The telephone is a core part of a balanced prospecting methodology that includes email, face to face, networking, social media and referrals.

The phone is the most efficient prospecting tool because when you are organized, you can reach more prospects in a shorter period of time than through any other prospecting channel—even e-mail. The telephone is also more effective than e-mail and social because when you are actually speaking to another human being, there is a higher probability that you'll set appointments and gather qualifying information.

Advice from an Industry Expert: Jeb Blount



This Playbook will show you what to do and say when you get prospects on the phone. You will learn how to reduce resistance, increase the probability that you will achieve your defined objective, and mitigate rejection.

The information contained here has been excerpted from the bestselling sales book, *Fanatical Prospecting*, by Jeb Blount

Some Hard Truths

- No matter what you learn here, you are probably going to still hate the phone. That doesn't negate the fact that to reach peak sales performance, you must master telephone prospecting.
- You are going to get rejected a lot on the phone because statistically you will generate more real-time interactions with prospects than through any other prospecting channel.
- Most of your calls will go to voice mail. Depending on your industry, prospect base, and targeted list you'll connect with between 20 percent and 50 percent of your prospects on average during phone blocks. This is why you must be effective when you get a prospect on the line.

Telephone Prospecting = Interrupting

“If you want sustained success in your sales career, if you want to maximize your income, then you've got to interrupt prospects. You'll have to pick up the phone, walk in the door, send an e-mail or text message, or ping a prospect on LinkedIn, Twitter, Google+, or Facebook and interrupt someone who is not expecting you to contact them.”

Jeb Blount, *Fanatical Prospecting*

The Fine Art of Interrupting



Effective telephone prospecting has always rested on the willingness on the part of the salesperson to interrupt. It is difficult and awkward to interrupt someone's day. You can't control their response.

Consider how you feel when your work day is interrupted by someone calling you unannounced. If you're going to get interrupted, what would you want? You would want the caller to get right to the point and get off the phone quickly so you could get back to work.

Prospects are people just like you who resent having their day interrupted by an unscheduled caller. Your goal is to make the call quick and to the point so that you achieve your objective and they can get back to what they were doing.

5-Step Telephone Prospecting Framework

Efficient and effective telephone prospecting should get you to yes, no, or maybe as fast as possible, in the least intrusive way, using a relaxed, confident, professional tone that reduces resistance.

A Repeatable Process

Remember that when you pick up the phone and call a prospect, you are an interruption. Your goal is to make the call quick and to the point so that you achieve your objective and they can get back to what they were doing.

To do this effectively, your call must be structured so that you get to the point fast—in 10 seconds or less—and sound like an authentic professional.

You also need a process that is consistent and repeatable. A consistent, repeatable structure takes pressure off of you and your prospect. Because you are not winging it each time you call, you won't have to worry about what to say. And, because you are focused and deliberate, it is respectful of your prospect's time.

The 5-Step Framework

Steps	Purpose	Example	Tips
<p>1</p> <p>Grab Attention</p>	Grab the prospect's attention by saying their name.	"Hi Cynthia."	<p><i>Don't ask, "How are you doing?" and don't pause.</i></p> <p><i>Say their name and keep moving.</i></p>
<p>2</p> <p>Identify Yourself</p>	<p>Right up front, say your name and agency.</p> <p>Identify the person who referred them.</p>	<p>"This is (name) from (agency)."</p> <p>"Our friend (name) suggested that I give you a call."</p>	<p><i>If the contact is someone you know well, it's not necessary to mention your agency.</i></p>
<p>3</p> <p>Reason for Call</p>	Give the reason for your call.	<p>"I'm calling to grab a few minutes of your time."</p> <p>"I'm calling to do some mutual networking."</p>	<p><i>Be open about the objective of your call.</i></p> <p><i>People value transparency.</i></p>
<p>4</p> <p>Because</p>	Give them a relevant reason to give up their time.	" BECAUSE I help people like you get organized with their finances – reduce the stress and make life feel more manageable."	<p><i>Say the word "because."</i></p> <p><i>Your because statement should be about the prospect, not about you.</i></p>
<p>5</p> <p>Ask</p>	Ask confidently for what you want . . . and then shut up.	"How about we get together on Thursday?"	<i>Be confident, direct, and don't pause. Then be quiet and let the prospect respond.</i>

Message Matters: Crafting Powerful Because Statements

Prospects meet with you for *their* reasons, not yours. You must articulate the value of spending time with you in the context of what is most important to them. Your message must demonstrate a sincere interest in listening to them, learning about them, and solving their unique problems. This is how you break down initial resistance so that you earn an appointment, gain the opportunity to gather qualifying information, or engage in a sales conversation right in the moment.

The Power of Because

In prospecting, all you really need to do is give your prospect a good enough reason to meet with you and they'll say yes. It doesn't need to be perfect—just good enough to get in the door. It has to be quick, direct, and persuasive, but it cannot sound like a cheesy script. It's got to be natural and authentic.

You need a message that can be delivered in 10 seconds or less and gives your prospect a reason or a "because" that's good enough to get them to say yes.

For example, just saying, "I'd like 15 minutes of your time because I want to learn more about you and your company" works surprisingly well with many prospects.

Appeal to Emotions

Frustration. Anxiety. Stress. Fear. Confidence.

What do these words have in common? They describe emotions. Emotional words demonstrate empathy and connect with how your prospect is feeling. The real secret to crafting effective prospecting messages is a simple but powerful premise:

People make decisions based on emotion first and then justify with logic.

Think about how you might be able to relate to your prospect's unique situation and how you can express this through the words you use, tone and inflection of voice, and body language.

Craft a short, compelling message that connects emotionally with what is important to your prospect. Use phrases and emotional words like:

- Learn more about you and your business
- Share some insights that have helped my other clients
- Share some best practices that other companies in your industry are using to...
- Gain an understanding of your unique situation
- See how we might fit
- Flexibility
- Options
- Confidence

Strong Because Statements Focus on Key Client Needs

One technique for crafting strong because statements is to focus on the key financial needs of your prospects who are at different life stages or in different roles. These because statements can then be easily customized when you are talking to people you know well.

Need	Prospect Profile	Example Because Statement
Get Organized and Simplify Life	Young Families	<p>BECAUSE having a young family can feel overwhelming. I help families like yours get organized and on track financially – which can help eliminate a huge amount of stress from your life.</p> <p>I thought you might be curious about some of the ways I’ve helped other families simplify their lives today and plan for the future.</p>
Protect and Achieve What Matters Most	Established Professionals	<p>BECAUSE you’ve worked hard to grow your career and family. I help people like you protect what you’ve achieved and work toward your next goals – whether it’s college funding, retirement, lifestyle or family legacy.</p> <p>I thought it would make sense to share some insights about how I’ve helped other professionals like you protect what they’ve achieved and plan for what’s next.</p>
Planning for Retirement	Pre-Retirees	<p>BECAUSE I’m sure you’ve been thinking about when and how you’ll retire. I work with folks like you as you approach retirement to help make sure you have enough money to live the lifestyle you want for the rest of your life.</p> <p>I thought it would make sense for us to get together so that I can learn more about you and your plans – and share some insights about strategies that have worked for others in your situation.</p>
Exit Planning	Business Owners	<p>BECAUSE one thing I’ve learned working with business owners is that they are 100% certain to leave their business one day, but most haven’t planned how. I help business owners, like you, craft an exit strategy so that you can realize the full value of what you’ve built.</p> <p>I thought you might be curious to learn about some business exit cases we’ve handled at our firm.</p>



The Discipline to Ask

The most important element of any prospecting touch is the ask—what you are asking the prospect to do or give up. If you fail to directly ask your prospect to take action, it really doesn't matter what else you say or do, because everything else was just academic.

The primary reason salespeople beat around the bush with passive statements, such as "Maybe if it would be okay and if you are not too busy we could kinda maybe get together for a few minutes, what do you think?" is to avoid directly asking.

Here is the brutal truth: There is only one technique that really works for getting what you want on a prospecting touch.

ASKING

That's it. Just ask. Ask for the appointment, ask for information, ask for the decision maker, ask for the next step, ask for the sale. Ask for what you want. Ask.

The fact is, if you are having a hard time getting appointments, getting to decision makers, getting information, or closing the deal, 9 out of 10 times it is because you are not asking.

Call Framework Summary: The Three B's



Be Brief

Get to the point.

- Don't ask "How are you doing?"
- Don't make small talk.
- Don't break the ice.

Just get to the point and tell them who you are and what you want



Be Bright

- Prospects will engage and meet with you for their reasons not yours.
- Ditch the pitch. Step into your prospect's shoes and develop relevant messages that connect with them on their terms.



Be Gone

Focus on getting a yes, no or maybe fast. Then quickly move to the next call.

This demonstrates respect for your prospect's time and makes you more efficient.

Putting It All Together

Call Examples

Prospect Profile	Example Approach	When Calling Someone You Know Well: Customizing Tips
<p>Natural Market – Friends and Family</p> <p>Asking for Introductions</p>	<p>“Hi, Rick, this is (name). “I’m calling for a business reason but first [insert personal question] . . .</p> <p>Let me put on my professional hat for a minute. I’m also calling to do some networking.</p> <p>BECAUSE a lot of young families are looking to get organized and on track financially – which can help eliminate a huge amount of stress from their life. I’d like to learn of people you care about personally or respect professionally who might be curious to see how they can take control of their financial life.</p> <p>Do you have 10 minutes to chat? Also- if there is any way I can help you or answer any questions based on your goals, I’m glad to return the favor and be your personal resource.”</p>	<p><i>When calling someone you know well, respect the relationship, be friendly.</i></p> <p><i>But be sure to acknowledge the real purpose of the call -- either at the beginning or with a formal transition, such as:</i></p> <p>“I’m calling for a business reason but first {insert personal question} . . .”</p> <p>“Let me put on my professional hat for a minute. I’m also calling to grab a few minutes of your time. BECAUSE . . .”</p>
<p>Young professionals/ young families</p>	<p>“Hi, Rick, this is (name) from (agency). The reason for my call is to grab a few minutes of your time.</p> <p>BECAUSE having a young family can feel overwhelming. I help people get organized financially and bring order to the chaos – which can help eliminate a huge amount of stress from your life. I thought you might be curious to hear about how I’ve helped other people simplify their life.</p> <p>How is Tuesday at 3 PM?”</p>	<p><i>Add details about their situation, such as:</i></p> <p>“With childcare costs and student loans to pay off, you’re probably wondering how you’ll ever get ahead.”</p>
<p>Established Professionals</p> <p>Anyone who has a financial goal</p>	<p>“Hi, Julie. This is (name) from (agency). The reason for my call is to grab a few minutes of your time.</p> <p>BECAUSE you’ve worked hard to grow your career and your family. I help people like you protect what you’ve achieved and work toward your next goals – whether it’s college funding, lifestyle or retirement.</p> <p>I thought you might be curious to hear about strategies that are working for other people like you.</p> <p>How is Tuesday at 3 PM?”</p>	<p><i>Use a personal because statement, such as:</i></p> <p>“BECAUSE, with three talented kids, I’m guessing that you’ve been thinking a lot about college funding.”</p>

Prospect Profile	Example Approach	When Calling Someone You Know Well: Customizing Tips
<p>Pre-Retiree Baby Boomer or Gen-X</p>	<p>“Hi, Chris. this is (name) from (agency). The reason for my call is to grab a few minutes of your time.</p> <p>BECAUSE you’re probably thinking about when and how you’ll retire. You’ve worked so long to acquire wealth; I want to help you make sure that you’ll have enough money to live the lifestyle you want for the rest of your life. When was the last time that you met with your financial professional?</p> <p>I thought the best place to start would be to get together so that I can learn more about you and your goals.</p> <p>How is Tuesday at 3 PM?”</p>	<p><i>Focus the because statement on their personal goals, such as:</i></p> <p>“BECAUSE, you and (spouse/partner) have always talked about doing more traveling once you retire.”</p>
<p>Business Owner</p>	<p>“Hi, Chris. this is (name) from (agency). The reason for my call is to grab a few minutes of your time.</p> <p>BECAUSE business owners are 100% certain to leave their business one day, but most haven’t planned how. I help business owners like you figure out their exit strategy so that they can realize the full value of what they’ve built.</p> <p>I know you’re really busy with the day-to-day operation of your business. But wouldn’t you like to take the time to learn more about 3 ways you can leave a business and see what choice would be best for you?</p> <p>How is Tuesday at 3 PM?”</p>	<p><i>When talking to someone you know well, mention the name of the business and add specific details, such as:</i></p> <p>“BECAUSE, even though you are the founder and CEO of (business name), you’re 100% certain to leave the business one day.”</p>
<p>Introduction (from a client)</p>	<p>“Hi, Frank, this is (name) from (agency). Our mutual friend (name) suggested that I call to set an appointment.</p> <p>BECAUSE I’ve been working with (referrer name) to help with a strategy for (need) and she suggested that you might have similar concerns. I thought it would make sense to get to know you and your specific situation and share some of the things that are working for people like you.</p> <p>How about Tuesday at 1 pm”?</p>	<p><i>Add details about the mutual connection and/or their relationship to the prospect, such as:</i></p> <p>“BECAUSE, I’ve been working with your colleague, Rachel to help her establish a college funding strategy. She mentioned that your kids are about the same age as hers and that you might have similar concerns.”</p>

Prospect Profile	Example Approach	When Calling Someone You Know Well: Customizing Tips
<p>LinkedIn Connection</p>	<p>“Hi, Rick, this is (name) from (agency). The reason for my call is to set an appointment.</p> <p>BECAUSE you commented on an article about xxx from my LinkedIn page. I’m interested to learn more about you and what provoked your interest from the article. I thought you might be curious about additional insights I have on the topic, that many of my clients have found useful.</p> <p>How about Tuesday at 3 pm?”</p>	<p><i>Add details based on the contact’s LinkedIn profile, such as:</i></p> <p>“BECAUSE, you downloaded an article from my LinkedIn page about the outlook for college tuition in the next decade. I’m interested in learning more about your situation because I work with many families to create college funding strategies.”</p>
<p>Follow-up from Networking Event</p>	<p>“Hi, Julie, this is (name) from (agency). The reason for my call is to grab some time on your calendar.</p> <p>BECAUSE during our conversation at the xxx meeting last week, you mentioned that you are changing jobs soon. I thought it would make sense to learn more about you and your situation so I can be a resource for you regarding benefits questions that might help you prepare for upcoming interviews. Let’s get together this week.</p> <p>How about Tuesday at 9 am?”</p>	<p><i>Refer to specific details from your networking conversation, such as:</i></p> <p>“BECAUSE, at the Women’s Forum last week you talked about your commitment to combat climate change. I thought it would make sense to learn more about you and your situation so I can be a resource for you regarding charitable giving strategies.”</p>



Prospecting Conversation Template

Apply the 5-Step Framework to personalize your approach for various prospecting call situations. Work with your Agency Leader or mentor to develop and practice your prospecting conversation.

Call Situation/Prospect Profile _____

Steps	Purpose	Your Approach
<p>1 Grab Attention</p>	<p>Grab the prospect's attention by saying their name.</p>	
<p>2 Identify Yourself</p>	<p>Right up front, say your name and company. Identify the person who referred them.</p>	
<p>3 Reason for Call</p>	<p>Give the reason for your call.</p>	
<p>4 Because</p>	<p>Give them a relevant reason to meet with you or give up their time.</p>	
<p>5 Ask</p>	<p>Ask confidently and assertively for what you want . . . and then shut up.</p>	

Make the Most of Your Prospecting Time

Schedule Phone Blocks

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00					
9:00					
10:00		Phoning		Phoning	
11:00					
12:00					
1:00	Phoning		Phoning		Phoning
2:00					
3:00					
4:00					
5:00					

Fanatical prospectors set up daily telephone phone blocks of one to two hours. During this time they remove all distractions—shutting off e-mail and mobile devices, and letting those around them know that they are not to be disturbed. They set clear goals for how many calls they will make. This call block is a booked appointment on their schedule and it is sacred. Nothing interferes.

Some people choose to break call blocks into small, manageable chunks and set goals for those chunks. It is much easier to set a goal to make 10 calls than 100 or to dial for 30 minutes rather than two hours. It is much easier to overcome your initial fears and trepidations a few calls at time. You can wrap your mind around these small chunks.

Define Call Objectives

The objective is the primary outcome you expect from your prospecting touch. Developing a defined objective makes you effective because on each prospecting call you know exactly what to ask for and how to bridge to your prospect's problems to give them a compelling reason to accept your request.

For FRs, there are three common prospecting call objectives.

Set Appointments



The primary objective of telephone prospecting is to set an appointment.

To be absolutely clear, an appointment is a meeting that is on your calendar and your prospect's calendar. In other words, they are expecting you to show up in person or by phone, video call, or web conference at a specific time and date. It is only an appointment when you have a commitment for a specific meeting time.

Gather Information



Gathering information is your primary objective with prospects you have not already qualified. Your drive as a sales professional should always be to spend your time with the most qualified prospects in your database. This means that you will want to gather information on the prospects for which you have some or no data so you can qualify their potential and eliminate the prospect records that will never be buyers

You may also make information-gathering calls to learn more about a potential market opportunity.

Build Familiarity



Familiarity plays an important role in getting prospects to engage. The more familiar a prospect is with you, your brand, and/or your company, the more likely they will be willing to accept and return your calls, reply to your e-mails, accept a social media connection request, and engage when you are prospecting in person. Familiarity as a prospecting objective requires a long-term focus because it is improved through the cumulative impact of ongoing prospecting activity.

Build Familiarity

It takes a lot of touches to engage a prospect. Fanatical Prospecting data indicates that it takes, on average:

- 1 to 3 touches to reengage an inactive customer
- 1 to 5 touches to engage a prospect who is in the buying window and is familiar with you and your brand
- 3 to 10 touches to engage a prospect who has a high degree of familiarity with you or your brand, but is not in the buying window
- 5 to 20 touches to engage a prospect who has some familiarity with you and your brand—buying window dependent
- 20 to 50 touches to engage a cold prospect who does not know you or your brand

Many Ways to Build Familiarity



Voice Mail

Each time you leave a voice mail, they hear your name and your company name and their familiarity with you increases.



Email

Each time you send an email, they read your name and see your e-mail address, company name, and service brand, and their familiarity with you increases.



LinkedIn

When you connect with them on LinkedIn, familiarity increases.



Social Media

When you like, comment on, or share something they post on a social media channel, familiarity increases.



In Person

When you meet them at an industry conference and put a face with a name, familiarity increases.

Use Voice Mail Effectively



No matter how proficient you become with the telephone prospecting framework, the majority of your calls are still going to go to voice mail. To get more of your messages returned, you must make it easier for your prospects to call you back.

There are five steps to leaving effective voice mail messages that get returned. This process deployed consistently will double your callback rate.

- 1 Identify yourself.**
Say who you are and the company you work for up front. This makes you sound professional.
- 2 Say your phone number twice.**
Prospects can't call back if they don't have or you garbled your number. Give your contact information up front and say it twice—slowly. After they hear your name and company, they may not care about the rest of your message because based on their situation, they can infer what it is about.
- 3 Tell them the reason for your call.**
Tell them why you have called. There is nothing more irritating to a buyer than a salesperson who is not honest about their intentions. After you give your personal information just say, "The reason for my call is..." or "the purpose of my call is..." then tell them why you are calling and what you want. Transparency is both respectful and professional.
- 4 Give them a reason to call you back.**
Prospects call back when you have something that they want or are curious about. Curiosity is a powerful driver of behavior. When you have knowledge, insight, information, special pricing, new or improved products, a solution to a problem, and so on, you create a motivating force that compels your prospect to call you back.
- 5 Repeat your name and say your phone number twice.**
Before you end your message, say your name again slowly and clearly and always, always say your number twice.

Become a Contact

When calling people on their cell phones, it's much more likely that they will pick up if you are a recognized contact. When meeting someone in person, be prepared to exchange contact information. Make sure that you are in your own cell phone, as a contact, with all your professional information filled in.

Practice sending your contact so that you can do it smoothly.

Set Phone Dates

When you meet a new person, ask if it's OK for you to send them an invitation for a follow up call ("phone date"). This will put the call on their calendar so that they are expecting to hear from you.



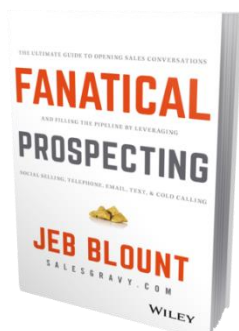
For More Information

Resources on Guardian U

Guardian U contains additional resources to support your telephone prospecting.

Essentials of Telephone Prospecting		
Self-Study Activities	Tools and Resources	Agency Leader Tools and Resources
<p>Read:</p> <ul style="list-style-type: none"> • Quick Card: Essentials of Telephone Prospecting • Playbook: Telephone Prospecting <p>Watch: Telephone Prospecting Techniques</p> <ul style="list-style-type: none"> • The Telephone is Your Most Powerful Sales Tool • 5-Step Telephone Prospecting Framework Overview • Step 1: Get the Prospect's Attention • Do Not Pause • Step 2 and 3: Identify Yourself and Reason for the Call • Step 4: Bridge to Because • Step 5: Ask for What You Want and Shut Up 	<p>Watch: Prospecting Discipline</p> <ul style="list-style-type: none"> • Knowing Your Call Objective Makes You efficient and Effective • Relentless Interrupting • The Discipline to Ask • Schedule Phone Blocks On Your Calendar <p>Key Tools</p> <ul style="list-style-type: none"> • Modern Appointment Setting (Scripts and Tips from Gail Goodman) • Prospecting Conversation Template 	<ul style="list-style-type: none"> • Lesson Plan: Telephone Prospecting • Coaching Guide: Appointment Setting • How to Run a Roleplay • Role Play Feedback Form: Telephone Prospecting • How-To Guide: Running an Effective Phone Clinic <div style="text-align: center; margin-top: 20px;"> <p>Agency Leader Resources</p> </div>

Fanatical Prospecting Resources



Purchase a copy of the Fanatical Prospecting book and get access to a wealth of online resources.

<https://www.fanaticalprospecting.com/>

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