

# HOW TO TURN MORE FOLLOW UP CALLS INTO SALES

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**ART SOBCZAK**



Art Sobczak: Hi and welcome to **How To Turn More Follow-Up Calls Into Sales**. I'm Art Sobczak. Have you ever had a prospecting call that you felt went okay? You sent out an e-mail or some literature. But then on the follow-up the prospect suffered a case of amnesia barely remembering who you were, let alone being interested in what you had to offer. Or how about that gut knotting feeling of staring at your prospect notes from a previous call as you prepare for the next one, racking your brain for, but not finding, what you're going to say on this call that's more inspiring than, "Well I'm just calling you back to see if you looked at my information."

Or how about not even being able to get a response from someone that you have in your follow-up files despite repeated calls, voicemails and e-mails? Well most of us have been in those situations and obviously they're not healthy as it relates to our sales success.

In this audio seminar were going to cover follow-up and as you'll hear that means insuring we have a good prospect to follow-up with. We have a good reason to follow-up. The prospect or customer is engaged and committed to moving the sales process forward and that we know exactly what to say and do on the follow-up call to maximize our success.

I'm going to present lots of my own ideas and tips and I've interviewed several other experts on sales in general and telesales specifically who will be sharing their thoughts. All right let's get started. I always like to start any type of training session or learning module on a particular topic with mistakes that commonly are committed and should be avoided in order for us to maximize our percentage chances for success.

So I decided to look at what causes people to fail in their own follow-ups and to do that I consulted with sales training expert and specifically inside sales expert, **Jeff Alexander**, who shared with us some points of follow-up failure.

**Jeff:** Okay, well Art you'd been talking about points of follow-up, failure and we've trained and coached thousands of people and there's six points of follow-up failure that I see more or less constantly.

So I what I want to do is describe what those are briefly and then take two or three seconds to talk about them in a little bit more detail. But the six we see most commonly, *the first one is failure to wrap up the initial conversation with action items for your next call and gaining agreement from the prospect as to what they are* . And that's real common, probably more common than the other five.

*But the second would be failure to call back in a timely fashion. The third one, failing to have an exciting, compelling reason for your next call. The fourth one is failing to log conversational results and scheduled callbacks into your CRM system. The fifth we see most recently is failure to use creative contact techniques when your prospect hasn't returned your call.*

*Then finally, the sixth one, not checking in at least once a quarter with a good prospect but a prospect that has no current opportunity. So let's talk about these one-by-one Art and take a couple of seconds to flush them out a little bit.*

The first one again, is *failure to wrap up the initial conversation with action items for your next call and gaining agreement from the prospect as to what those action items are and when you'll come call back.* Because at the end of that initial conversation you know exactly whether your contact is a valid prospect or not, according to your qualification criteria.

You're going to have some action items if this person is a prospect. Discuss them with the prospect as you end the call, gain agreement as to when you're going to call back and for what reason you're going to call back. So both you and the prospect are aligned with what the action items are for your next call.

The second point of failure that we see is *failure to call back in a timely fashion*. Now timely fashion depends on the urgency of the sales situation, but if you've got a live opportunity you should be calling back at least once a week to discuss progress and action items and keep your name in front of the prospect.

Point of failure number three – *failure to have an exciting, compelling reason for your next call*. You should always make the prospect happy that you called. Have a valid new response to one of his or her concerns, a new solution offering that will improve your prospect's life or maybe even discuss some good news about your prospect's company that might positively impact your sales situation. This might even be something that you saw on the prospect's website that you could make a comment on or something you saw in the newspaper about some good news regarding his or her company.

Failure point number four – *failure to log conversational results and scheduled callbacks in your contact relationship management or a CRM system*. Most of us make dozens of telephone calls a day. We can't remember everything about the conversation, particularly after two or three other conversations occur. So it's really important to log important data points in the CRM right after the call's finished, not only for you so that you can remember what you talked about but if you use presale tech support people or sales engineers. They'll have to access to your CRM as well and if they need to call the prospect for any technical reason they'll have the information you logged in. It'll make the call easier for them and help them to help you sell to the prospect.

Failure point number five is *failure to use creative contact techniques when your prospect hasn't returned your call*. And this happens a lot of the time even when you have a proposal in front of a prospect. Why isn't the prospect returning your call? Might be that he or she really is busy or feels that he or she doesn't have anything valid to tell you. Your name comes up on the caller ID system and the person elects not to take the call.

So here are three things you can do to have a conversation with that prospect. First of all you can hide your caller ID. On my telephone I use star 67. That works on most telephones in the United States. What that does is that hides your caller ID. That means the person on the other end of the line doesn't know who is calling.

Another thing you can do is to listen to his or her outgoing voicemail message all the way through to see if he or she lists an alternative contact. Many times he or she will. Then you can call that alternative contact and say, "I'm trying to reach my prospect. Is he or she in the office right now?" And even if he or she isn't, maybe the alternative contact is also engaged in the sales process that your prospect is involved in and then you can ask that person questions and meet that person as well.

And finally you can always hit zero-pound (#). When you get your prospects' outgoing voicemail message ask the receptionist to put you through to somebody else in the department who can track down your prospect. In my experience, prospects are never angry when you do this if there's a valid reason for you to talk to them and that goes all the way back to the top of the list we just talked about, which is have a valid reason. And if you've got a proposal in front of that person, you have a valid reason.

Finally, the very last point of failure in following-up is *not checking in at least once a quarter with a good prospect, no current opportunity people*. We talk to these people everyday. They're part of, in many cases, huge enterprises who we'd love to be our customers but they've got valid reasons today why they can't be customers.

It's all too easy to let these people slip under the rug and not call them again. What you want to do is you want to use your scheduler and your CRM, put these people in a tickler file. I call these kinds of people at least once every 90 days to make sure my name is in front of them. They remember who I am, so when there is an opportunity we can make something happen.

So Art, I would say of all the people I've trained and coached, those are the six most common points of failure that I see.

Art: Thank Jeff. I certainly agree with all of those.

As we go through this program you'll hear several of the key points repeated, reinforced and reemphasized by our experts as well as myself. That's because they work. And we'll be expanding more on the specific ways to avoid those mistakes that Jeff mentioned as we move forward. And speaking of that, I spoke with another long time columnist in my newsletter, **Jim Domanski**, and Jim shared with me eight very specific meaty tips for success on your follow-up calls. For this I suggest you have a pen and a paper out and hey, hit your pause button if you need to so you don't miss any of these.

**Jim:** Well Art I typically recommend a little bit of overkill if you like. I'd rather have a rep do a follow-up and do it thoroughly then go to the other extent and not do it well enough. And to that end I've got eight tips on how to make a more perfect follow-up call.

*The first tip, of course, is to get commitment on the follow-up* and I think this is what reps don't do. They typically end up saying, "Let me give you a call next week" or "I'll fax that over to you and I'll call you a little bit later." And what they should be doing is saying something more specific like, "I'll send that proposal over to you Art. And what I'd like to recommend is we set up tomorrow morning at 8:15 to review it in detail and determine the next steps if any." By getting the client to commit to a date and a time and a specific action you are going to increase the odds of that client being there. In fact roughly 70 percent of the time clients are there for that meeting. So that helps get rid of tire kickers and it keeps momentum in the sale.

Now *the second step and you can't always do it, but you want to build equity and be remembered.* One of the neat things you can do if your follow-up is a little bit later on, perhaps a week or so after your initial call, is to send a thank you card. Handwrite that thank you card; make the message simple with something like, "Art it was a pleasure speaking to you. Looking forward to talking to you a little bit later on this week, or on Tuesday," or whatever it is.

You can also e-mail a thank you, but I find an e-mail gets easily lost and ignored where as a handwritten thank you card with a stamp helps you stand out from the crowd. So it's a nice jester. You can't always do it but when you can, use it because it really sets you up for a better follow-up call.

*Tip number three is to send an e-mail reminder and an agenda the day before your meeting.* So if we are to have a follow-up call on Thursday, on Wednesday I would be sending you an e-mail and it might say something like: "John, just to confirm our appointment on Thursday, July 27th when we have our conference call. It should only take about 10 minutes and we'll review the proposal. I'll answer any questions that you might have and we'll determine the next steps if any." That way the client is reminded of the meeting of what's going to happen and it's important that you put the time in there so that it doesn't detract. If it seems short they'll likely be there for the call.

*Tip number four, add a value, add a P.S.* Now a P.S. like in letters, like in e-mails, always gets read. And this is a great time, if you can add a value added article, something relevant to what you were talking about. I'm not about talking about propaganda that your company has on a product or a service, but perhaps an article that relates to something in the industry. And you can put that in there, "P.S. – Art I thought you might like this article regarding something or another." Maybe we had talked about golf. Maybe you could put that in there.

What that does for you is it gets you remembered. People read the P.S. They look at it and even if they don't read the article itself it creates a little bit of equity in you and creates a little bit of reciprocity, the need to kind of repay you back by being there on time for the appointment on the following day.

*Tip number five, kind of a no brainer. But call on time.* Oddly enough today, Art, you and I had a call and I wasn't there on time and that was my fault. So don't do what I say, do what I preach. The fact of the matter is it does happen. But when it does happen, be prepared for consequences. The big consequence is that if you're not calling on time maybe that's a reflection of your services that you're going to be offering or your delivery times or what have you.

*Tip number six, avoid opening statement blunders that most sales reps make.* And quite frankly, Art, I've taken this from your stuff and it's good stuff because I hear it every day. Typical reps will call up and say things like, "I was just calling to follow-up on that proposal. I'm calling to see if you had any questions. I just wanted to see if you got that e-mail. Is it okay?" And the problem with opening statements like that is that they do not create any value for the listener. They don't remind the listener of why you had that meeting in the first place and that is tip number seven.

*Tip number seven is build an opening statement that I say 'gets through the clutter.'* So, for example, you may want to say, "Art it's Jim Domanski calling from TeleConcepts Consulting. The reason for my call is, of course, to follow up on our discussion that we had where you indicated you were having some challenges in training and getting your reps as productive as you'd like. As per my e-mail, here's what I'd like to propose as an agenda." In that example I reminded Art about the pain that he had experienced, how the training and his reps weren't as productive. In effect we want them to go, "Oh yeah, yeah, that's why I agreed to this call. Oh yeah, yeah, yeah that's why I should be paying attention."

These are little things, but put together you've created a big thing. *The eighth tip is this, be persistent, be polite and be professional but don't be a pest.* So for example, if you call and the person is not there, the trick at that point is to leave a message so that the person knows you called on time and it's a very simple message, "Hey Art. It's Jim Domanski. I'm just calling for our 8:45 appointment. Sounds like you might be tied up for a few moments. I'll give you a call in 10-minutes if I haven't heard from you but in the meantime my number is..." So Art will hear that message. If he's a little bit late he can call. If he's tied up somewhere else and hears the message at least he will know that you kept your word.

Now call in 10-minutes. And if Art still isn't there, leave another message, "Hey Art it's Jim calling from Tele Concepts following up on our 8:45 appointment. Looks like you're still tied up. Please give me a call when you are free at, (here's my number). Otherwise I'll call you later on this morning or this afternoon." Now a good rule-of-thumb at this point is do not call again right away because you will look like you're stalking. The trick is to leave it about four hours or so, half a day. That gives the person plenty of time to call you back.

At that point you can call and if you run into voicemail again leave a message that goes something like this, "Hey Art it's Jim Dominski. I've called a couple of times but as of yet we haven't been able to connect. When we last spoke you were concerned about some issues in training and how our reps were not as productive as they might be. So I'm sure you don't want to let that go by. So give me a call when you have the opportunity and we'll set up another time." Note that in that message I went back to Art's pain and note that I said, "I called a couple of times." Kind of getting a message that I called and I didn't get a call back but I've given some grace by saying, "But as yet we haven't been able to connect." The implication is that Art may have called me and I missed it. So it's easier for him to call back and feel less sheepish.

So there you have it. There are eight tips that you can use to help make that follow-up call all the more effective.

**Art:** Thanks Jim. Great tips as always. As I mentioned Jim's been writing for our newsletter for a number of years and at his site he has tons of great ideas, tips and articles. So I encourage you to go there. That is [TeleConceptsConsulting.com](http://TeleConceptsConsulting.com). Again Tele, T-E- L-E, Concepts Consulting dot com.

All right I'm going to expand on a number of the points that Jeff and Jim had just made regarding follow-up calls. I have one undeniable rule regarding follow-ups and it's this. *The success of your follow-up call is directly proportionate to how well you conducted and ended your previous contact.* Ending a call with, "Okay I'll send you out some literature and give you a call back in a couple weeks," virtually insures your demise on the contact, and rightfully so. There's nothing specific here. There's no connection between this call and the next one. There's no summarization of the problem or the need or the interest - if there's any interest at all by the way - and no confirmation of who's to do what next.

Now granted, some of these prospects that maybe you can't get in contact with might have genuine interest in what you sell. But I find that many sales reps waste a lot of time chasing shadows. Prospects who keep telling you to call back but don't have any intention of ever buying from you. So to avoid this futile exercise and to separate the buyers from the time wasters and to insure that you have a great reason to call back, you really need to answer - in very clear terms - these three questions:

Here we go. *Number one, why is a follow-up call necessary? Number two, what do you need to do between now and the next call? And number three, what will the prospect or customer do between now and the next call?* Only if you are able to answer these will you have the maximum chance for success on the next call. You can't end a call by rushing off the phone as soon as possible by blurting something out like, "Well let me send you out some stuff and I'll get back in touch." And then expect them to be so excited over it that they're going to call you with an order.

Normally it results in the sales rep scratching his head before the follow-up call, this confused because he's coming up empty when he's trying to think of something more brilliant to say on the follow-up than, "Well I sent you out the stuff. Did you get it or what'd you think?" Hey even if they are interested most people are not going to think about you any further until the next call unless you give them a reason to take action.

So what we're going to do right now is go over how you can get them to take action and how you can answer these three questions that I mentioned earlier, paving the way for a solid follow-up call.

Here we go – *number one, why is a follow-up necessary? Why are you calling back?* Well too many sales reps commit to call someone back but they aren't sure why. Now here I'm primarily talking about calls to prospects since you're probably calling your customers on a regular basis anyway. A follow-up call to a prospect should only occur when you've thoroughly qualified the person you're speaking with as having the interest, the need, the authority and they money to buy. Then you should know in very specific terms why a follow-up contact is required. Exactly what action needs to be taken before a sale can be closed?

For example, in some types of industries or with certain products and certain type of call strategies the sales process is stretched out over several or multiple contacts. Maybe the first call might be to qualify, generate interest and get out some material or set up a demo.

The second would be a fact-finding mission to gather enough information for a proposal or a quote and so on. However, other sales people operate on a one or two call closed system and it's in these cases where the sales rep should know why they're calling back if a sale isn't accomplished on the first or second contact. Perhaps upper level management needs to sign off on such a purchase. Or the prospect truly does need to talk it over with someone. Whatever the case, be sure to you know exactly why that decision can't be made today. And be sure it is a real reason. Some prospects keep sales people twisting in the wind teasing them with a decision that never may occur.

*Number two what are you going to do?* This question needs to be answered and that is what do you need to do between now and the next call? So this could involve sending something out, e-mailing something, checking out a price quote, researching for competitive information. Again what are you doing? The point here is let the prospect know what you're going to be doing for them, and then of course, you're going to do it.

*Step number three, assign some homework here.* Finally to get the prospect involved you need to assign something that they're going to do and get a commitment. If they are truly interested - and they are because you're calling them back, right? - you need to get their agreement as to what they'll do between now and the next call. For example, if they're going to talk it over with somebody else. Well we'll need to find out specifically when they're going to be meeting with them, get their commitment that they're going to recommend your products or your service or your proposal in a meeting.

This is critical since if they won't agree to do something before the next contact it's a sign that they really don't see enough value in taking action. And so some specific questions might be: "Are you going to recommend to your committee that this is what you're going to do? What's going to happen on your end after you receive the sample? What's going to happen between now in our next call?" If they're going to study your literature, your PDF file or go through your demo, point out particular areas in advance that they're going to be interested in based on your questioning and then get their commitment that they're going to do it.

For example, "Okay John, to review before our next conversation, I'm going to send over to you the comparison report, which you're going to have by this afternoon. And I'll highlight the page number that you should study to get the figures that you need. And on Monday you're going to a meeting with your boss and presenting my proposal with your recommendation at that time. Is that right? Great, what other information might I be able to provide, which would help you sell in the meeting?"

The call ending is so critical to your follow-up success, that I want to further break down the components here. Here's what you should cover at the end of your call to ensure a nice transition from this contact to the next. And by the way, this assumes that you didn't get a sale, and we're all pretty good at wrapping up that type of call right?

All right, so here's what we need to summarize: Their need or their problem and their interest – you need to revisit what they were interested in and why. And again this also presumes that you had done a great job of questioning to uncover all of that on this call. That's absolutely critical. We'll talk a little bit more about that later.

Also next, what they're going to do. At the very minimum, again, you should get commitment that they're going to read something. They're going to prepare some questions. They're going to again go through the demo or the sample and evaluate it according to the criteria you both discussed. They're going to go to the committee recommending your proposal. Again this is critical. If you don't get a commitment for action this person might not ever become a customer and you'll be chasing them forever. Asking for and getting some type of action commitment is my way of tightly qualifying people. Again, if they're not taking action why are you calling back?

And again review what you're going to do, what you're going to send, who you're going to speak with or whatever else you promised. And finally, you need to agree on when you're going to talk next. Don't say, "Hey how about I give you a call in a couple of weeks?" Let them give you a date. And here's a great tip for you, tie it to their commitment like this: "So Pat, by when do you think you'll have collected all that inventory information that we're going to need for our next conversation?" Or, "When are you going to be meeting with your committee in presenting the proposal?"

So now not only do you have a date and a time, but you also have their commitment, the commitment again that they're going to perform their duties. And then finally you need to go through the next call agenda. Go over what's going to happen next. This plants a seed as to what they should expect on the following call. So here's another example of a call summary: "So let me go through what we've covered today. So you feel that we will provide you with better availability and you like our customer service policies and you do want to get going with that new inventory program that we offer. But you need to wait to get funding in the next budget, which you're going to suggest in your next budget meeting, which is going to happen on Tuesday so that we'll plan on talking again next Friday when I call you. Does that all sound right? Great."

I also spoke with sales trainer **Colleen Francis** of Engage Selling ([EngageSelling.com](http://EngageSelling.com)) on this topic. She agreed with the points we've been presenting so far and shared some of her own ideas.

**Colleen:** Art one of the things that I find with telephone sales rep especially is they don't do enough follow-up and I was laughing with a client the other day saying, "More deals are lost because of lack of follow-up than are lost because of overly persistent follow-up." And so I am always concerned about sales reps losing business because they don't follow-up enough and I see far too often sales rep who say they made a call six months after the original call or three months after because that's what the customer said to do. And then when they call they get a message from the customer that says something like, "Oh you're just a week too late." Or, "You're just a month too late." And that's really heartbreaking after putting all of that work into qualifying that deal.

So what I work with sales reps on is finding a way for them to have an effective follow-up call based on what they did on the last direct conversation with a client. And I believe that the quality of that follow-up call is a hundred percent dependent on how they ended the last call and I know you believe that to be true as well.

So here's a technique that we teach – when you're on the phone with a client and the client says, "Follow-up with me in three months, six months, one, month, next quarter," whatever that is. Say to the customer right away, "Thanks so much for being interested." Or, "I'm happy to follow-up with you." Something that shows that you're going to take action.

And then ask them one of a number of questions. You might say, "What's happening next quarter that's going to make this opportunity more interesting for you?" Or, "What's happening six months from now that is going to make you want to do business with us?" So you can really find out what the situation is and they might just say, "Hey that's when our budgeting starts." Or, "That's when our hiring freeze is off." Or whatever information that is.

And so then you're going to set an appointment. You'll say, "Great, I'm happy to call you in October." And the customer will say, "Sounds good." And then say to them, "How does the first week look for you?" And they might say, "Yeah it looks fine." And so just throw a date and a time out. "Super. I will call you October 2nd at 10:00am." Now there's a really big chance that the customer won't put that date and time in their calendar, but it gives you a formalized follow-up and a really strong opening line when you call that customer back because you can now say, "Hi Art. It's Colleen from Engaged Selling, calling because when we spoke in July we agreed to October 2nd at 10:00am for a call. Sorry I missed you. I will call you back Friday at 2:00." And you've got a really strong follow-up call.

The weakest follow-up calls are the follow-up calls that lead with, "Hey Art, its Colleen from Engaged Selling. Um, just calling to, uh, see if anything has changed."

**Art:** Colleen and I also discussed how to know when to schedule the timing of your follow-up calls and not always going by what the prospect or customer suggest.

**Colleen:** One of the other things about follow-up that is important is not to take the clients so literally. Many times sales reps make the mistake of believing that when a client says, "Call me back in six months," that you should call them back in six months and wait that six months. But for every month that goes by, you become less and less visible to the customer. So it's really important that you say to the client or ask permission to stay in touch with them before that six months or three-month period.

Any time a client asks you to follow-up with them outside of 30-days you need to get into the habit of saying that you will do that in setting the appointment, as I said earlier. But also say to the customer, "If something comes up in the meantime that I think would be valuable or a value to you, can I send you an e-mail or put that in the mail to you?" And just so that you can get them in the habit of hearing from you more often than every six months or every 30-days because they're hearing from your competition and if the situation arises where they have to buy early and you're not top of mind you're going to lose out on that business. So it's important to get into that habit.

I think it's also really important to ask questions of your client whenever they ask you for specific dates and times because you need to find out, for example, if you're selling a product to a client and they ask you to call in six months, is that because the project is starting six months from now or is that because they need to have the product implemented six months from now? Many clients work backwards in their minds and so you could speed up the sale by asking that question. And say, "Oh should I call you in six months because that's when you need to have the product implemented? Or is that when the project is starting?"

If they say to you, "Well that's when we need to have it implemented." Now you can work backwards and say, "Oh if you need to have it implemented then perhaps we should start talking four months from now so we that we can get you everything you need to get the purchase in place, the training done and the product installed or the service implemented." So always make sure you ask, especially if the client gives you a long turn date – three months, five months, six months, next year – what the project plan is so that you can maybe start calling back a little bit earlier as well.

**Art:** All right, so what about the people that we have in our follow-up files who maybe we haven't spoken with in a while? Perhaps they were in an active sales process for a while. Things cooled down for whatever reason - maybe it was our own fault - we haven't been in regular contact with them. So now the dilemma is that we're still holding on to these people. They're taking up space in our follow-up files. They're taking up our time but we're not sure if they're worth our time or not. What do we do? Well I consulted with sales expert and trainer, **Mark Hunter**, who's also cleverly known as the Sales Hunter and he suggest a technique to get a response or at least to help you determine if you need to speak with them any longer.

**Mark:** *Another technique I love to use is what I call the Three Step Shuffle. The Three Step Shuffle or the Three Step Dance is very simply I've got somebody I've engaged with. I'm not quite sure where they're at. I'm going to do three levels of communication with them. And if I, after those three levels of communication with them, haven't received some sort of a meaningful response back from them, I move them over into my suspect list. They're really no longer a prospect. When I need The Three Step Shuffle I might, 'A', call them, 'B,' send them an e-mail, three, send them a written correspondence.*

Now I'm going to send them three levels of communication using three different mediums. Now the reason I'm using three different mediums is because I want the customer to see me at different levels and not every medium hits every person.

Now what I say is...I'm going to call them. Now maybe I get their voicemail. Okay, fine. I'll go ahead and leave them a voicemail message but I'm going to leave them a voicemail message that teaches them something. Maybe I'm going to shoot them an e-mail. I'm going to shoot them an e-mail, again teaching them something. And maybe I'm going to send them a postcard. Maybe I'm going to send them a letter. Maybe I'm going to do some other medium. Maybe it is even a fax. Now in each of these mediums I'm also going to post a question. A question is going to get them thinking. What I'm looking for is some sort of response back from them. If in those three follow-ups they cannot come back to me with some sort of a comment, some sort of feedback, some sort of response, then guess what? I probably am wasting my time engaging with them. And it's a very quick, easy way to begin separating those people that I want to spend time with and those that I don't because for too many sales people, they wind up spending time with dogs that really don't hunt, with dogs that aren't really going to get them anything.

**Art:** Thanks Mark. Those are so some valuable ideas. By the way Mark has a lot of great sales tip at his site, which is [TheSalesHunter.com](http://TheSalesHunter.com), T-H-E, Sales Hunter dot com. Mark you also mentioned to me something that you call the Rule of 48, which is wise to follow regarding the timing of your follow-up call.

**Mark:** Let me share with you one more piece and I call it *the Rule of 48*. In fact I used to call it the Rule of 72. I've done a lot of work in the financial industry and, of course, we've all heard the Rule of 72 and that means if you grow something at 10 percent it will double every 7.2 years. And I used to say the Rule of 72 says that you've got 48-hours to follow-up with that customer. Guess what folks? With LinkedIn and Twitter and voicemail and e-mail and everything else, 72 hours is way too long. You have 48-hours. You got 48-hours to follow-up with that customer. That means they've got to see something in their hands because if you can't follow-up with that person within 48-hours they've moved on to something else. You've fallen off of their radar screen completely.

And I'll tell you what, if you're going to get a response of the customer, you're going to get it out of them in that first 48-hours or you're not going to get it at all.

**Art:** Now some people might be thinking, "Wow 48-hours. That's quick." Well sales trainer and author **Bill Lee** has some surprising statistics that show you might even want to follow-up more quickly.

**Bill:** Art in most businesses I work with, prompt follow-up is an extremely critical point in optimizing sales opportunities, especially if you want to prevent a competitor from beating you to an order.

Let me give you an example from my industry. I work a lot with construction supply people. When a home builder is ready to start building a new home, the builder will typically hand out sets of blueprints to several construction supply sales people and ask for a quote on the materials necessary to complete the new home. Over the years I've learned that it's critical to follow-up with that builder within 24-hours. With a comment like, "Do you have a couple of minutes for me to explain why I specified a particular product or a particular construction technique when I quoted this job?"

Now the reason I learned this is because we used to do surveys with all of our customers on what we called a quote to order ratio. And we learned that the average client of ours in the construction supply industry was only getting 20 to 25 percent of all of their quotes turned into orders. When we instituted this 24-hour follow-up we were able to, in most cases, increase the quote to order ratio from low 20s to up in the low 60s. So the odds shift heavily in the sales person's favor when he or she follows-up within 24-hours of delivering an initial bid or quote.

**Art:** Wow, some interesting statistics there, Bill. By the way you can go to Bill's site and get lots of great sales information for both sales reps and managers. Bill's site is [BillLeeOnline.com](http://BillLeeOnline.com). That's Bill, B-I-L-L, Lee, L-E-E, Online dot com.

Bill you told me you have another tip about the importance of timely follow-up in another area.

Bill: Another time that I have found it to be critical to follow-up on a timely basis is when a sales person receives a referral. In my sales training programs I tell sales people that referrals are like gold and they have to really treat them with a great deal of respect. The entire follow-up process can be enhanced if the sales person will take just one extra step and ask a friend or customer to telephone the prospect and tell the prospect that he's giving his name to sales person that he respects.

Then give the prospect the sales person's name and then ask the prospect to be sure and take the call when the sales person telephones. Then when the sales person gets the prospect on the line the most effective words I found to use are these – “Joe Smith asked me to give you a call and I promised him that I would. Is now a good time for us to talk?”

Now assuming that you have a good conversation, that you followed up with the prospect, you've got the prospect on the line it's absolutely critical to call that referral back, the person who gave you that referral, give them feedback. Say, “I got him on the phone. I sincerely appreciate the referral and I'll keep you informed as to our progress.” Follow-up is essential if you want to keep referrals flowing from your friends or customers out there.

**Art:** Right now I want to re-emphasize a point that's been made several times and that is how to open up your follow-up call and then what we should be doing on that call. So let's imagine that we've placed what we thought was a pretty good first call to a prospect. We qualified them, generated interest, identified a need, sent out some type of material and now it's time to call back and move the process forward or close the sale.

It should be pretty easy and require very little selling on your part, right? No, very wrong. Here's one very important point regarding follow-up calls and everything else is going to revolve around this point. You need to do as much or more selling on the follow-up and subsequent calls as you did on the initial call.

The mistake that even the best sales people make is that they assume the prospect's going to be ready to buy on the second call or the third call because the first one went so well. And as a result, calls with opening statements similar to these result: "Hi Steve. Bill over at Allen Industries. Have any questions on that information I sent?" Or, "Hey Kathy, Mark Smith calling you back. Did you get the letter I sent?" Or, "Hey it's Pat over at Anthony Equipment. I sent you our proposal. Just wondering what you thought about it."

Well, of course, those opening statements are horrible since none of them state what is in it for the prospect and they marginally explain the reason for the call. Your opening statement on the follow-up call needs to be as strong as your opener on the initial call that you placed, assuming that it was strong.

The reasoning is that although you may have a vivid recollection of what you discussed on the first call, they might not even remember you right away. They probably have spoken with 30 or 40 other sales people since then or maybe avoided that many since then. Therefore, in your follow-up call opening you need to remind them that you spoke before.

Even if you have a phone appointment and they are expecting your call, remind them of what you discussed so that you can quickly move into the call.

So let me give you my *four-step process for a follow-up call opening statement*. *Number one, is identify yourself and your company*, unless you have a very intimate relationship with them. I suggest first name and last name. *Step number two is to remind them that you spoke before*. I like to say something like, "The reason for the call is to pick up on our last conversation." Or, "I'm following-up on the last time we spoke a couple of months ago or a couple of weeks ago," whatever it was. "I'm calling to continue our conversation of last week." And then *step three really is just a continuation of that sentence and that's mentioning their need or their interest and/or the action they were taking*. Now again, we are trying to bring them back to where their mindset was on the previous call. They're not sitting there thinking about you or their need or their interest right at that point. Therefore, it's our job to help them revisit their interest. So you want to say something like, "I'm calling to continue our conversation of last week where we had discussed...", then you fill in the blank there specifically what they were interested in and the benefit. And then also what they were going to do. "And you were going to recommend to your director that he take a look at...", and again you're filling in the blank there with their action.

*Step number four, very simply were going to give the purpose for this call*. "What I'd like to do is go through the information I sent you. If I caught you at a good time I'd like to go through some additional information that I think you'll find useful. I'd like to go over the results of the discussion with your vice president." And then also here let me add something, bring something new to the table and you might say, "And I've got some additional information that I think you're going to find helpful." Or, "I've got some good news on some research that I had done for you."

Let me give you an example of this, "Hi Joe. Art Sobczak with Advantage Industries. Hey the reason for the call is I'm continuing our conversation of last Monday where we had discussed how you could increase your production capacity by 10 percent with no increase in cost. I'd like to go over three of the points I highlighted in the literature that I sent you. And I've got some additional information that I think you're really going to find helpful."

So in that opening the caller identified himself, gave the reason for the call, which was to continue the conversation, reminded them of what they spoke about the first time, mentioned the benefit and referred to the material and then also brought something new to the table. And by the way, notice that we don't say, "Hey I sent you out some stuff. Did you get it?" Assume that they received it. Beginning a call with the poor examples that I mentioned earlier is awkward and leaves the caller nowhere to go.

So as mentioned earlier, an important point to remember about follow-up calls is that you need to continue selling. After all if they were ready to buy they would've called you right? Too many sales reps make the mistake of calling back and then they hope that the prospect's going to say, "Okay looks good. I'm ready to buy." Well we know that is rarely the case.

Many sales reps get stalled in their pursuit of sales because they're not targeting and communicating with decision-makers at a high enough level. So for this segment I interviewed **Dan Hoemke**. Dan was a CEO heading up Humana Healthcare's western region. Now in his own consulting and training firm he helps organizations and their people sell to the highest levels in the health care field. Dan, give us your perspective on the importance of follow-up in the sales process, especially at the higher levels.

**Dan:** Art I'm sure that you're familiar with getting the sales call where you can't get a word in edge wise. And I can tell you from both being at the executive level as well as making calls to C Suite those are absolutely the least effective calls you can possibly make. I think what's most important in terms of understanding a follow-up call is that it really needs to be a part of an overall strategy. And as much as we would like to kind of short circuit the process so to speak, that process really does include some very fundamental steps and it starts with relationship. We need to do something to create connectivity with people with whom were dialoguing.

The second thing is that we really need to go through a good discovery process and that really is about learning everything we can about the people that we're trying to do business with both in terms of their businesses, their organization, as well as the individuals who may be the key stakeholders in terms of our services.

And then once we have that understanding then we're at a point where, assuming that there is a good fit, we really have the opportunity to present a solution or advocate a solution or an approach and, of course, as we all know decisions take time and need to then support people through the decision process.

The reason I mention this is because you really do need to be mindful of that process in those steps because oftentimes calls are more about promoting your concepts and all too frequently we're in the process of advocating solutions with people that we don't have relationships with or organizations that we don't adequately understand. So it's important that we start from that context.

**Art:** I agree. Too many people suggest a follow-up when there's no basis for it and they have not done sufficient discovery as you pointed out. And then they wonder why they can never get back in contact with their prospect and usually it's because the prospect realized that there was nothing of value that the sales rep had to offer. And I'll be blunt here, maybe they made the determination that the sales rep was not really equipped to sell at the prospect's level.

So really what I'm getting at is, what you're saying Dan is that especially at this level we need to have a great understanding of the prospect and ensure that we're paying attention to the early part of the sales process so that there can be a valid meaningful follow-up. Tell us how the follow-up fits in.

**Dan:** The follow-up call really is part of your overall sales strategy. And that sales strategy is a continuous process, it's a continuous cycle. And it really starts with taking advantage of every opportunity you can to first validate your understanding. And that's important because often times we kind of advance processes or advance discussion, sometimes with inaccurate information. So it is important to validate your information.

The second thing is that it's really critical to make sure that we know what new information do we need or what additional information do we need in order to be able to really understand whether there's something that we have to offer of value to the people that we're trying to do business with. And then only then is it appropriate to do some select messaging, which again is quite contrary to the way most of us do it because most of us again are constantly pitching as opposed to really trying to understand the environment.

So after you have this understanding, after you've validated your understanding after you've gotten new information that's critical, then it's possible to do some select messaging, particularly if it's in the context of kind of connecting what you do with what's important to the client. And then, of course, once you've done that the most critical thing is looking for an opportunity to secure a commitment from the client.

I use the example, often time of the folks that I work with, is that every kind of selling situation is kind of like football. It's kind of like starting out on the 20-yard line. And if you have an opportunity to validate some understanding, if you have a chance to get new information, if you get a chance to communicate some select messages, it's kind of like a running play. But where you really have an opportunity to move the chains and get a first down so to speak, is when you get a commitment from the client. That's where you really have an opportunity to start moving that ball down the field.

And more importantly, really start to advance the relationship based upon again, some connectivity that you have with the people that you're doing business with as well as connectivity with what's important to them. Kind of funny, as you know Art I worked with a lot of different clients in helping them in complex situational sales negotiations and that sort of thing. And I had a client recently after a number of meetings come back to the office and really express an incredible amount of frustration. In fact, was quite angry. And their comment was, "I just don't understand why they don't get it."

In this case, I think there were a couple of conference calls and maybe they demonstrated their product on the web or wherever. And this person was very frustrated and just continued to say, "I don't understand why they don't get it." And after the smoke cleared, we sat down and we talked a little bit about what had occurred and I really challenged this person with regard to the fact that it's really not important that they get it. It's important that we get it in terms of understanding what's important to them.

And it was, again, a really good example. In that situation, I would say that this person not only didn't gain any yardage or certainly get a first down, but lost some yardage and frankly may have even lost the ball if you continue kind of using that football analogy. And Art I'm sure you've seen in situations like that where people actually kind of fumble material opportunity just by not spending enough time listening.

**Art:** Dan that's true regardless of whatever level you're selling it. So what suggestions do you have for moving the process forward effectively and setting up your follow-ups?

**Dan:** It's interesting when you reflect upon what doesn't work for people or what are some of the key challenges or the things that make people fumble the ball so to speak, more often than not - very honestly - it has to do with poor preparation. And that you're really not setting up the call to begin with. And again, using the football analogy, most often you are using different plays to set up a major play, maybe set up a passing play or set up a long yardage kind of situation.

And the same is true with the follow-up call. It really needs to be set up from the beginning and I think part of that set up really needs to include a couple of really critical elements that people need to think through. The first is that with whomever you're talking, whatever the company is, whoever the representative is, there has to be a compelling and valid reason for them to want to talk with you.

And it's kind of the flip side of the coin because all too frequently we make our follow-up calls based upon our reason to talk with them as opposed to a reason that they would want to talk with us. So I think it's important to really look through the lens of prospective customers and make sure that we see that there's a valid reason for them to want to talk to us.

I also think were possible, you should always, always try to set up both your first call and potentially your follow-up call at the C Suite level. What's really important there, of course, is trying to do it ideally with either the decision-maker or someone that's going to be very influential in terms of the decision process.

Obviously one of the most effective ways to set up the call in terms of dealing again with either the C Suite or somebody that's not at the C Suite level is to take what you've learned in that first call and document it very carefully. And in setting up that call you have an opportunity frankly to deliver on your first promise, which of course is incremental to building the relationship. And that first promise may go, and I'll give you an example, often times when I meet with people for the first time whether by phone or in person I will always take lots of notes. And in taking those notes I might close the discussion by saying something like this, I might say, "Art, you know, I really appreciate the time you spent today. I have learned a lot. As you can see I've taken a lot of notes. It's really important to me that my understanding is accurate. What I would like to do is go back to the office, organize my notes and with your permission I'd like to send those back to you and schedule a call where we can kind of just review my understanding and make sure, in fact, that I have an accurate understanding of what we talked about today."

Now, of course, that does several things. One is it demonstrates that I really care enough to take really good notes and more importantly, I care enough to really understand. The second thing is that it gives me an opportunity. I'm actually cultivating or setting up that next call. And of course, in addition to that it's giving me an opportunity, as I mentioned, to deliver on my first promise by taking those notes, going back, organizing them carefully. And of course, it's also a great way to demonstrate that you can generate a really good work product for your client that's thoughtful and well organized.

So it's a fabulous way in which to reconnect with the client overall. And of course, if you've established a C Suite relationship I mean obviously it's a great way to really talk strategically as well as tactically because you're talking to somebody that has accountability for both areas.

If you are not dealing at the C Suite level, again I love the fact that if you can get connect with the C Suite in your first call, and I can think about my own experiences as CEL, often times people would call me, would engage maybe in an initial discussion or schedule a call for an initial discussion and I might refer them to someone else in my organization that I would like them to talk to or I may delegate it to another person.

But the great thing about that is once that connection has been made to the C Suite, you really have an opportunity then throughout all your discussions with anyone else in the organization, to keep that C Suite level contact informed of what's going on in your discussions. And in fact, I would argue that you even have an obligation to do so.

So again it's a great way to start building a variety of bridges into the organization and the neat thing about it, of course, is again, if you establish the C Suite relationship, you can nurture that whether they're the principle person that you're dealing with at a particular point in time or whether you're actually dealing with one of their subordinates.

**Art:** Thanks Dan. Great information from someone who has been on both sides of the sales desk at the highest level.

All right, we've covered a number of mistakes to avoid and then specific ideas, tips and strategies to move your sales process forward more quickly and how to successfully follow-up with people who can and will buy from you. Follow these strategies and I'm confident you will turn more of your follow-up calls into sales. I'm Art Sobczak.

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