THE ULTIMATE CUSTOMER CALL CHECKLIST

A successful sales call doesn't happen by accident, definitely not because you sound charming over the phone nor because you have memorised every feature of your product. It happens because you do specific things to make it successful.

Each call should have a specific purpose, desired outcome, and intended result. Before making a sales call, ask yourself, "What do I want to accomplish or have happen as a result of this call?"

- [ ] Get the names of an important contact
- [ ] Qualify an opportunity
- [ ] Negotiate a sales contract
- [ ] Get a decision regarding...
- [ ] Determine a close date
- [ ] Close an opportunity
- [ ] Make a presentation

Remember to stick to your goal in order to best communicate your value and tailor those goals specific to each prospect.

PREPARATION

- [ ] Research the prospect prior to the call
- [ ] Learn something about the person and their business before the meeting
- [ ] Send an outline of the agenda before the meeting
- [ ] Have 3 unique selling propositions (USP) prepared
- [ ] Bring all material, brochures, contracts
- [ ] Answer 3 important pre-call questions
- [ ] What is the goal of the call
- [ ] What do I need to find out during the call
- [ ] What is the next step after the call

GREETINGS & INTRODUCTION

- [ ] Present yourself, your company and product in positive light
- [ ] Ask the customer about their business goals
- [ ] Ask the customer what challenges the company is facing
- [ ] Find out the names of the contacts in the account

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QUALIFY

- [ ] Find out who the decision maker is
- [ ] Ask what process they normally go through when considering a new vendor
- [ ] Find out what the time frame is
- [ ] Find out how much they are paying for their current solution (if applicable)
- [ ] Find out if funds have been allocated and how much
- [ ] Find out their specific needs
- [ ] Ask if they could change something about their product or service, what would it be

SURVEY

- [ ] Ask about the corporate structure
- [ ] Ask about the prospects' role in the company
- [ ] Ask what's important to them
- [ ] Ask what's interesting to them
- [ ] Ask what risks they perceived
- [ ] Ask how we can help solve the problem
- [ ] Ask how they think about your company
- [ ] Ask what they like and dislike about the current vendor
- [ ] Ask how industry trends are affecting them
- [ ] Ask what they would like to see from a vendor and salesperson in the area of support after sales
- [ ] Ask what their short-term and long-term goals are
- [ ] Ask how you could become their most valued vendor
- [ ] Ask what are the next steps

HANDLING OBJECTIONS

- [ ] Listen to the entire objection
- [ ] Remain calm
- [ ] Meet the objection with a question in order to find out more
- [ ] Answer the objection
- [ ] Complete the 6-steps process
  - [ ] Listen
  - [ ] Define
  - [ ] Rephrase
  - [ ] Isolate
  - [ ] Present solution
  - [ ] Close

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PRESENTATION

- [ ] Present yourself, your company and product in positive light
- [ ] Talk about the benefits to the customer
- [ ] Link the benefits to the customer's need
- [ ] Verify each needs before moving on
- [ ] Pre-commit the prospect
- [ ] Keep the presentation focused on the customer's need
- [ ] Involved the customer in the presentation
- [ ] Summarize the customer's need and how the product or service meets those
- [ ] Use layman's words

CLOSING

- [ ] Get the customer to identify all possible problems that might be solved by the product or service
- [ ] Get the customer to identify the value of solving the problem
- [ ] Get agreement that the proposed solution provides the values
- [ ] Ask for the order (Why don't we go ahead with this?)

CUSTOMER MAINTENANCE

- [ ] Write thank you note for appointments or orders
- [ ] Ask for reference letter and referral
- [ ] Establish a schedule for follow-up and customer visit
- [ ] Send thank you note to lost accounts
- [ ] Ask what are the 3 important things you could do as a vendor to keep the relationship stronger

USEFUL TOOLS TO ENHANCE CUSTOMER RELATIONSHIP

- [ ] Omni to make calls via a fully virtual landline PABX system that operates on smartphones
- [ ] A Customer Relationship Management (CRM) system, like Freshsales, to manage all contacts, status updates, invoicing and all communications with leads and customers.
- [ ] A ticketing system, like Freshdesk, to manage all incoming enquiries from customers

USEFUL TOOLS WITHIN OMNI

- ☐ Landline Number With Extension - To present your company professionally while keeping your operations mobile
- ☐ Interactive Virtual Receptionist - To make sure that calls are routed to the correct person
- ☐ Call Activities - To have a complete view of all calls by the team and track miss calls.
- ☐ Business Hours - To make sure all calls after business hours are recorded and directed to voicemail for further action.
- ☐ No more deskphones - So your team can get more done without being tied to an office desk!

Contact **hello@omnihotline.my** or fill up **this** form for a free consultation on how Omni can be a great alternative to your existing call setup.

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