



***Prospecting Call Guide to Executive Referral
Follow Up Call to Executive Referral
Goal: Get Initial Appointment***

General Call Tips:

- Act natural. Use your own words.
- Smile when you talk (they can hear a smile!).
- Be organized at your workspace, and have all relevant information handy.
- Try stand when you talk.
- Use the following Call Summary as a guideline – you will settle into your own flow and conversational style.

Call Summary:

1. Introduction:
 - a. Hello, this is <Name> with <company>
2. Reason for the call:
 - a. I just called <executive name> and I was referred to you as the right person to speak with about <define the Business Benefits of your product or service>
3. Moment of Silence:
 - a. Wait three seconds for a response of some sort. The goal is to get the executive to ask a question and engage you in conversation. If you don't get a response, proceed with "Who we are"
4. If asked who we are, respond:
 - a. <Insert company elevator pitch here>
5. Proof Statements:
 - a. Just recently we worked with ... (describe recent project for a similar company)
6. The Offer:
 - a. I'd like to offer to get together with you and whoever else in the company might be interested to:
 - b. Demonstrate our solution for you



- c. Show you samples of some our recent work with other companies like yours and share some ideas with you about ways we can help you to (describe benefits).
 - d. Discuss your upcoming needs and brainstorm with you to see how we can best help you to ensure their success
7. Close for appointment
- a. May I suggest we get together some time next week? When would work best for you?
 - b. If Yes – schedule meeting and close the call.
 - c. If No – probe for needs by asking an open ended qualifying question (see examples below), or offer another proof statement and try again.

Sample Qualifying Questions:

- Open ended probing question: Can you tell me little about ...?
 - Open-ended leading question: What are your biggest challenges in the area of...?
 - Closed-ended question to probe for specific needs: What needs/projects do you have scheduled for this year?
 - Closed-ended suggestive question: Many companies like yours experience challenges in the area of (describe need or business issue). How do handle this at your company?
8. Courtesy Comment to Close Call and Confirm next step:
- a. Thanks again <Name>. I'm looking forward to meeting with you on <date/time> at <location>. (if appropriate)
 - b. Good-bye!