Special Report:

Appointment Setting
How to Write an Effective Cold Calling Script
A Consultation with Wendy Weiss,  
The Queen of Cold Calling

Many people think they can just “wing it” or they “know what they want to say.” On the telephone, however, you have 10 seconds to grab and hold your prospect’s attention and frequently you don’t get a second chance. Ten seconds goes by very quickly. Your first impression has to be strong enough to carry you through the rest of your pitch. “Winging it” is risky and just generally doesn’t work, and “knowing what you want to say” without having actually crafted your message and practiced it can easily turn into “gee, I didn’t say that very well…” In addition, when you have to think about what you are going to say it is extremely difficult to focus on and listen to your prospect. You will be nervous and anxious and thinking about what might happen rather than focusing on what is happening.

Like the Girl Scouts, it is better to be prepared. A good script, a well-thought-out presentation that says what you want to say, precisely and succinctly, yet that still gives you room to maneuver, is one of the keys to a successful telephone pitch. This is about communication and about being prepared. In writing your script you are crafting a message and focusing your message to your prospect. Your goal with your script is for your prospect to hear you and for your prospect to get “hooked.”

So what makes a good script? Write your script the way you talk—and get to the point. Written language and spoken language are very different. If your script is in written language you will sound phony. Real people do not speak with capital letters at the start of sentences and periods at the end. People actually speak more in phrases or fragments, with pauses, sometimes improper grammar and the occasional ah or um… It is imperative that you sound real, so if you are having a difficult time with this, try talking into a tape recorder, then playing it back and writing down what you say.

Don’t bother asking your prospect “how are you today?” or “may I have a moment of your time?” or anything else. Start by asking for your prospect by name. You have probably already asked the secretary for your prospect by name but when you think your prospect is on the line, ask again. “Jane Jones please.” There are two good reasons to do this. Reason number one—everyone loves the sound of their own name, and reason number two—the
more practical reason—you want to make sure that it is indeed your prospect on the other end of the line and not the secretary or someone who picked up by mistake. Then greet your prospect, “Hello Jane” or “Hello Ms. Jones”--whichever way you are comfortable. Next, introduce yourself. “My name is (your name goes here), my company is (your company name goes here)” or “My name is (your name goes here), I’m with (your company name goes here).”

Next is your sound bite. A sound bite is one sentence, 2 seconds in length, which expresses simply and succinctly what you do (or what is your product or service). Example: Wendy Weiss teaches people to get what they want over the telephone.

So in one sentence you must describe what you or your company do. If you do not have a good, solid sound bite description, stop here and work on it till you do.

Your sound bite, or the following line, should position you as the expert—someone (company, product or service) who stands out from the pack. If you do this well you will preempt the objection: “I can’t meet with every salesperson who calls.” You will not be “every salesperson who calls.” To do this, you cannot say the same things that everyone else is saying—so be creative. When I started my business there were many others providing similar services representing companies, making calls and setting new business appointments for sales representatives. Generally these people worked in-house, were not particularly well paid and were called telemarketers. Even this early in my career I knew I was not a telemarketer. I decided I was a Marketing Consultant Specializing in New Business Development. This put me in a different category altogether. I was the expert, the outside consultant hired to help develop new business. I could set my own fees and work the way I wanted to work and build my business.

Another example: I have a client with whom I work setting up new business meetings. He is a printer—and New York City is full of printers. So this is how I position my client and myself as experts. After introducing myself and my client and giving my one sentence sound bite, I say: “...we’re educated, we’re accommodating and we’re reasonable people.” At this point my prospect and I are no longer talking about printing—we are talking about
people. I have changed the subject, taking my client out of the “printer” category and placing him in the “people” category. This sentence does something else—it positions me, my client and the company on the same side as our prospect, with all of the uneducated, unaccommodating, unreasonable printers on the other side. Since anyone who has had any printing done has probably had at least one bad experience, they identify with this sentence and I have them hooked. The last thing this particular sentence does is to make the prospect laugh. Laughter is a great connecting force.

Find a way to set yourself up as the expert. You can use phrases like “we specialize in…” or “our reputation is…” “we are known for…” You can also name-drop credentials to help this positioning. Mention clients or customers in similar businesses as your prospect. This does two things: it lets your prospect know that you are familiar with their industry and it will also make prospects feel safer if they have not heard of you before. Most people do not like being trailblazers and instead prefer to follow another’s lead. If they know that you work with others in their field they are more inclined to pay attention. Do try and sound bored when you name-drop credentials. It’s reverse psychology; if you sound impressed with your client list, you can also sound rather foolish. If, however, you sound unimpressed with your client list, it is actually a strong way of positioning yourself as the expert. In addition, if someone has referred you, this is a good place to drop his or her name.

Next is the heart of the script. Describe your product or service, pointing out relevant customer benefits. Remember—your customers are interested in benefits. In addition, when you point out customer benefits remember, as much as possible with the limited knowledge you may initially have of your prospect, to point out customer benefits that may actually interest your prospect. Your prospect will buy for her reasons, not yours. That is why it is important to do your research so that you have a sense of what your prospect may need and may be interested in.

Focus your message to your prospect and speak in their language. If your industry has a particular jargon—don’t they all?—use it. You cannot be the expert if you do not know the language. If, however, you are in an industry that has a jargon—but your prospect doesn’t know or use that jargon—speak
 plainly. Your intent here is communication. You want to be understood. This part of your script does not need to be long and unwieldy--a few salient points will do. You can bolster this section with a success story, something you, your company or product did for a customer. How you saved them money, or saved them time or saved the day when they were in a tight spot. By inference, this will mean that you will do the same for your prospect. It is also a way of pointing out customer benefits without actually having to say “and the benefit to you, Ms. Prospect, is…” You might have several different success stories that you use depending on the type of lead on which you are working.

I recently worked with an accountant who is starting his own business. This client had no background in sales and had absolutely no idea about how to even begin to make introductory calls. He came up with several different success stories about clients in different industries and how he saved them money. He then targeted these stories to the appropriate prospects. He had a success story about an entrepreneur starting a new business—he told this to other entrepreneurs starting new businesses… He had a success story about an attorney—he used this success story with other attorneys… These stories showed by inference that he understood their businesses, their needs and their problems. He had helped others with exactly the same businesses, needs or problems—he could therefore help his prospect as well. You can use success stories in exactly the same manner.

Your script is fluid. How your conversation with your prospect proceeds will determine what parts of your script you will use. So make sure to leave some maneuvering room in your script so that if you need to change tactics, for example tell a different success story, you can easily do it. You make sure that you have maneuvering room by being prepared, knowing your customer benefits and knowing which customer benefits may interest a particular prospect. Also have several success stories that you can use depending on the point you are trying to make. And please, don’t be afraid to say the unexpected or to use humor. Yes, this is business, but we don’t have to be dull about it.

Then the close. Here it is… Ask for what you want. All your hard work is worth nothing if you do not ask for what you want. Do not expect that your
prospect will know what you want, or guess what you want, or offer what you want… It is your job to ask, clearly and precisely.

So, what do you want? Most would probably answer that you want to turn your prospect into your customer. You want your prospect to buy your product or service. That’s all true, but that comes later. What you want now is to get your “foot in the door.” You want to introduce yourself, your product and/or your company so that later the prospect can be induced to buy. If your prospect does not know you, is not familiar with your product or service, they will never buy it. They have to know you exist before they will even consider making that purchase. Therefore what you want now is an appointment. At this moment you are not selling your product or your service, you are selling an appointment and only an appointment. You want the prospect to give you 10 to 15 minutes of their time, so that you can introduce yourself, your company, your product, your service—that is it. At this point you are not asking for the prospect to do anything but give you time. You are not asking her to buy anything or change anything that she does—only to meet with you.

If you think about the appointment in this manner, you will also realize that almost any objection to a meeting that your prospect may voice is then largely irrelevant. Perhaps your prospect already has a vendor that provides a similar product or service. So what. None of us can predict the future. The situation could change. Besides, you’re not asking that she buy anything, you want to meet with her and introduce yourself. Period. Perhaps your prospect doesn’t use a similar product or service and says she has no need. She doesn’t need it; she will never need it. So what. None of us can predict the future, anything is possible, and one day perhaps she may. Now I am not suggesting that you spend your time setting up meetings with people who do not need your product or service, but what I am saying is that the qualification is on your part, you actually need to decide if you want to meet this prospect. Is this prospect worth your time and energy?

Salespeople frequently ask me about closing a sale. Closing a sale is certainly your ultimate goal. You will also use many of the same techniques to close that you use in introductory calling. At this moment, however, your focus must be on “getting in the door.” This is step one and all of the other steps follow this. You cannot allow your anxiety about closing a sale to
interfere with the step you need to start the process that ultimately will effect that sale.

When making introductory calls it is always vital to stay “in the moment.” That means that you are only thinking about what you are doing right then. You are not looking at the past; you are not looking into the future. You are in the present—moment by moment. If your previous call was a disaster—it doesn’t matter. It is now history. Your focus is on now. When in the middle of an introductory call, you must also be careful not to allow yourself to worry about your future introductory calls. That’s in the future. Your focus needs to be totally on what you are doing at the moment. And what you should be doing at the moment is making an appointment.

So with that out of the way—what do you say?

Ask for an appointment--ask for a meeting. I generally like the word “meeting” better than “appointment.” It has more weight and substance. Say: “I would like to meet with you,” “I would like to introduce myself, my company, my product…” “I need 10 minutes of your time.” Be clear, be bold, be to the point. Give them some choices of times: “Is this Thursday good or would next Thursday be better?” It is easier for your prospect to choose between options, such as different dates, than to decide whether and if to schedule. Assume your prospect will schedule the meeting. It makes sense that they would want to. If they are using a similar product or service then they need you or someone just like you. If, on the other hand, you are introducing a product or service that is new or that your prospect is not aware of, something that might save them time or money…you are helping them—and they will want to know.

Additionally, if your prospect is already using a similar product or service then making the decision to purchase this particular item is part of their job. And they are supposed to do their job to the best of their ability. Part of that would be finding the best for the least, staying on top of new developments in the field, exploring options, contingency planning… This is where you come in. Meeting with you works to your prospect’s advantage. By introducing yourself and your product or service you are helping your prospect to do her job.
Once you have scheduled the meeting, make sure that you confirm the prospect’s name, title, and address. Also make sure she has your name, your company name and telephone number. Repeat the date and time of the meeting at least twice. You want to make sure that you are both talking about the same date. In addition, as you give your prospect your name etc. and when you repeat the meeting date and time use your voice to direct your prospect to write everything down. Speak s-l-o-w-l-y and distinctly at a pace that they can write. Your prospect will interpret this way of speaking as a direction to write. This way they too will have the meeting in their calendar and there should be no mix-ups.

The Script Formula:

- Ask for the prospect by name
- Say hello. “Hi. Ms. Prospect” or “Hi Jane”
- Identify yourself and your company. “My name is ____. My company is____”
- Say what you do (sound bite)
- Position yourself as the expert. Use phrases like “we specialize in…” or “our reputation is…” “we are known for…” You can also do some name dropping of credentials here
- Describe your key selling points and clearly point out the Customer Benefits
- Tell a success story that is tailored to your prospect to help point out Customer Benefits
- Ask for what you want—an introductory meeting. “I would like to meet with you…” “I would like to introduce myself, my company, my product…” “I need 10 minutes of your time.” “Is this Thursday good or would next Thursday be better?”
- Keep asking for what you want.
About the Author

Wendy Weiss, The Queen of Cold Calling™, is an author, speaker, sales trainer, and sales coach. She is recognized as one of the leading authorities on lead generation, cold calling and new business development and she helps clients speed up their sales cycle, reach more prospects directly and generate more sales revenue. Her clients include Avon Products, ADP, Sprint and thousands of entrepreneurs throughout the country.

Wendy has been featured in the New York Times, BusinessWeek, Entrepreneur Magazine, Selling Power, Sales & Marketing Management and various other business and sales publications. She is the author of, Cold Calling for Women, 101 Cold Calling Tips for Building New Customers in a Down Economy and the recently released, Sales Winner’s Handbook, Essential Scripts and Strategies to Skyrocket Sales Performance.

She specializes in working with companies that want to increase sales revenue by generating new business and/or companies with under-performing sales teams. She has helped clients double and triple the number of new business appointments they can schedule resulting in a matching increase in sales.

“…the number of demos my team is able to schedule has tripled. From there, our closing ratio has tripled as well.”
Markene Vogele
Vice President, Sales
Gateway EDI

“In the four years I have been the CEO of ParishPay, we rarely have had someone impact our organization and improve our results as you have. Last year we had three inside sales staff members and this year we have two. Our results this year were 128 appointments set by phone in 3 months, as opposed to 45 last year. If anyone can do math, they can see the value of your input in a phone-based sales operation. Your clear, easy-to-follow instructions in a group or personal one-on-one setting helped our team accomplish our goals and then some.”
Andrew Goldberger
CEO
ParishPay / InTuition

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