

# 14 Things Salespeople Must Know Before Calling a Prospect [Checklist]

In sales, there are no second chances. If you screw up a call, you don't get a second at-bat -- the damage has been done, and whether you can turn things around depends as much on your prospects as it does on you.

That's why you have to walk into each call completely prepared. Yes, you're probably juggling dozens of prospects and there's a lot of information to keep straight between them, but do you think your prospects care about that? (Hint: They don't.)

Prospects care about the following things: Whether you can help them, that you care about their problems as much as they do, and whether the recommendations you make are feasible and implementable.

They don't care that they're your fifth call of the day or that you have three other prospects named John.

The list below represents the full spectrum of information you should know before calling or reaching out to a prospect.

Miss on any of these points and you might be able to scrape by (the list is split into must-knows and nice-to-knows), but in a profession where you're singing for your supper, you should always make sure you've done everything you can to make your calls a success.

# 14 Things You Have to Know Before Picking Up the Phone

## What You Must Know

### 1) Your prospect's name

I wish I didn't have to say this one. But if you have a high volume of prospects, sometimes your calendar invites will blend together and you'll accidentally mix up Jessica at 3:30 with Jennifer at 4:00. You might not think it's a big deal, but your prospects will -- here's one buyer's take on what he thought when a sales rep called him [the wrong name](#).

### 2) Their job title

This one's a no-brainer too. You should never ask a prospect what they do when a simple LinkedIn search would tell you the answer. Instead, ask them about their company's organizational structure or what teams they work with to get a sense of how your prospect fits into the larger picture.

### 3) Their company

Go beyond just what the company name is. What does the business do? Who's on the executive team? What information can you find on revenue, number of customers, and number of employees?

You won't know everything, but a good rule of thumb is to avoid asking prospects anything you could have easily found out yourself.

#### **4) Their social media profiles**

Your prospect's online presence provides essential context to any conversation. Make sure you check out -- at a minimum -- their LinkedIn and Twitter so you have a better sense of who they are as a person. Check out the LinkedIn groups they post in, and the Twitter interactions they have to see if they've mentioned any business pain, asked any questions relevant to your product, or have simply brought up any information that might be useful for you to know.

#### **5) Their career trajectory**

It's useful to understand your prospect's job history so you have a sense of whether they've made similar purchases to your product in the past, how experienced they are in their industry, and whether they're new to the industry. All these factors will influence how much a prospect can impact a purchase decision, how much education you'll have to do, and how quickly a decision can be made.

#### **6) Recent company announcements**

Did your prospect's company recently announce Series C funding? A fifth straight quarter of losses? A new product line? You need to know about it if you're going to appear informed and up-to-date.

#### **7) Common connections**

Check your prospect's network for connections you have in common -- whether it's former colleagues, current customers, or just mutual friends, a common connection can act as a referral, provide recon on a difficult-to-reach point of contact, or simply serve as a rapport-building conversation point.

#### **8) Their previous interactions with your company**

Always search your company's CRM or marketing automation system for a record of your company's previous engagement with your prospect. What content have they looked at or converted on? Have they ever spoken with a sales rep before? Even if it's your first time speaking with a prospect, they might have a long relationship with your brand, and it's important to know if this is the case so you can pull that context into your conversation.

## **What's Nice to Know**

### **1) Recent competitor announcements**

Your prospect's competitors will always be top-of-mind for them. So while bringing up all the innovations their competition has announced in the last three weeks isn't exactly the tone you want to set on a first call, you should understand the prospect's competitive landscape so you can speak intelligently about how your product can give them an advantage.

### **2) Conferences and forums they've attended**

Like your prospect's job history, understanding how involved they are in their industry is important context that will shape your interactions with them. If it turns out you've been to the same events, it's also a great rapport-building point.

### **3) Their hobbies**

If you and your prospect have a unique hobby or interest in common, don't hesitate to bring it up. While it obviously shouldn't take up a significant chunk of your conversation, a shared interest is a good way to remind your prospect they're speaking with a human.

# **Bonus: Must-Knows for Follow-Up Calls**

## **1) What you talked about on your last call**

Hopefully, once you've engaged a prospect you're taking notes on every interaction you have in your CRM. (If you haven't been doing so, start now.) Before you speak with any prospect, always pull up your previous interactions so you know what you've already covered and refresh yourself on important details that may have slipped your mind.

## **2) How this call will drive the sales process forward**

Every call needs a purpose -- your time (and your prospect's time) is too precious to squander on a pointless chat. You should have a clear objective for each call and a predefined next step based on the information you gather during it.

## **3) Your agenda for the call**

Agenda-setting is a vital skill. Your prospects know less than you do, so you need to drive the call forward without appearing overbearing or controlling. That's where agenda-setting comes in -- it allows you to define a logical flow for the call with your prospect's buy-in. Check out this post from HubSpot VP of sales Pete Caputa for more tips on successfully [setting a sales call agenda](#) and mistakes to avoid.

*What do you make sure you know before you call a prospect?*

# 12 Mistakes Salespeople Make When Setting a Qualification Call Agenda

Setting an agenda for a call is a table-stakes sales skill -- salespeople should learn and master early in their career. However, while agenda-setting isn't usually hard for an initial or closing call, most salespeople really struggle when doing it on an exploratory call.

Many salespeople try to apply the same agenda-setting process they use for other types of calls to the discovery process. But to really excel at turning interested prospects into likely buyers, reps need to master the agenda-setting process for this two-way dialogue where buyers and sellers are trying to simultaneously determine fit.

Avoid these 12 mistakes to ensure an effective call and increase your chances of moving qualified buyers closer to the closing stage.

## **1) They skip agenda setting.**

Some salespeople skip agenda setting altogether. Don't do it. Without an agenda, the call will go in unanticipated directions. To the prospect, it'll feel like you're aimlessly rambling or asking ineffective and unrelated questions. They'll have trouble connecting your stories and questions with their goals and challenges and they'll begin to tune you out. Worse, you and the prospect may battle for control of the call.

## **2) They wait until they're on the phone to set the agenda.**

The best time to set an agenda for an exploratory sales call is when the call is being booked -- not when the call is in progress. When a prospect agrees to schedule a call, they usually have their reasons: They might be in serious need of your service and ready to buy, they might have just started to evaluate solutions like yours, they might only be curious about what you do, or it could be something else completely.

Regardless, this is your chance to uncover why they are taking the call in the first place. Asking what they want to accomplish on the exploratory call not only ensures you're spending your time with a viable prospect, it also allows you to start shaping and planning the call.

Most sales calls require some preparation for you (and ideally for your prospect as well). Setting an agenda in advance allows you both to complete your homework. The homework you assign them can range from thinking about a few of your standard questions to sending them some information to review. Assigning pre-call tasks tests their commitment and helps make the call much more productive.

## **3) They forget to recap what they already know.**

Don't forget to recap what you've learned from previous conversations and other research you've done.

To get your exploratory call off to a good start, the easiest thing to do is pick up where you left off. For example:

*"When we last spoke, you shared a few challenges that you're frustrated with. You mentioned X was preventing you from*

*achieving some important company goals, like Y and Z. Can you expand a bit more on what you're dealing with?*

Many prospects will repeat what you discussed in your initial exchange and expand on their challenges, giving you more detail. Getting them to open up right away is a great way to get started, enabling you to ensure your agenda will be focused on the challenges they've acknowledged. You should ask follow-up questions and repeat back some of these issues, so they know you're [listening effectively](#).

#### **4) They skip rapport-building.**

It's sometimes hard to agree upon an agenda. Building rapport first makes it easier.

Don't be too eager to get down to business. When a salesperson sets the agenda immediately at the beginning of a call, it usually sounds rehearsed. Do it too soon in a call, and your buyer will think you're a robot setting the exact same agenda on every call.

Breaking the ice helps your prospects realize you're a human being who is trying to help them -- not just another salesperson trying to close them as quickly as possible. This helps make the whole call more of a conversation instead of a pitch or interrogation and sets the stage for mutual accommodation.

The first time you attempt to build rapport, you might have to do some research about the person: Where do they live? Where did they go to school? Do they have kids or pets? Are they sports fans? Are they accomplished in their career or just starting out? Regardless of your choice of topics, never skip rapport-building at the beginning of a call.



Though some buyers might want to get right down to business, a skilled rapport-builder can crack a smile or get a chuckle out of even the most serious of prospects. You can always abort or abbreviate your rapport-building attempt if they really push back. But if a prospect thinks you're all about the sale and not interested or concerned about them, it's hard to overcome that perception later.

## **5) They set a vague agenda.**

Agendas should be as specific as possible. Almost everything worth doing requires a plan, especially when two or more people are involved. Usually, the more detailed a plan, the better the execution.

Sales calls are no different. Too many salespeople show up to a call with a vague proposal for a call, like, "I figured we'd talk about your business and I'll tell you about my product." This is not an effective agenda. It does not include a goal and there is no clear benefit to either party.

Even if your agreed-upon agenda is just to get to know one another, make it clear that you're doing so to see how you might be able to help each other -- whether it's by doing business directly, referring each other to acquaintances, or learning something specific from one another.

## **6) They assume they know what the prospect wants to talk about.**

Another thing salespeople screw up is assuming their agenda is the right one. Too often, salespeople come in to sales calls with their own agenda, share it, and get started.

When this happens, some buyers will stop the rep and say "I'd like to cover X instead," but many just go along with it and tune you out if your standard rant isn't relevant to them. Problem is that you won't know your message was irrelevant until they start ignoring your future attempts to reconnect.

The single most important part of setting an agenda is to ask and then really listen to what the prospect wants to talk about. "By asking what the prospect would like to get out of the call, the rep shows respect and gains insights into what's on the buyer's mind," Sandler Training CEO Dave Mattson [points out](#).

Gaining insight into your prospects' objectives allows reps to make conversations relevant regardless of what stage of the [buyer's journey](#) a lead is currently in. They might have no clue they need your service, or they might have shortlisted you and are ready to pull the trigger if you check off all their requirements. Conversations in these two different scenarios should be completely different, of course. But you won't know what conversation to have until you ask your prospect what they already know, what they want to know, and what they think they need.

My personal preference is to ask my prospect what they'd like to cover before I propose an agenda -- not after. Chances are, you'll be able to incorporate their agenda into yours. They'll feel heard, but you'll still be in control.

This approach works particularly well when the prospect is an inbound lead or you've had a thorough connect call. In these cases, your prospect probably already knows what you do and how you're different, so what they're interested in talking about will likely be what you're interested in talking about.

The main exception to this rule of thumb is when the prospect doesn't know much about what you do. In this case, follow Mike

Weinberg's advice on setting agendas by positioning how you help people like them, then asking them what they'd like to talk about.

Here's an [example from Weinberg](#):

*“Ron, thanks for inviting me in. I believe we set this up for 30 minutes. How are you on time? Great.*

*Here's what I'd like to do: Let me kick us off and take two to three minutes to share just a bit about ABC Ozone Aggregators, the issues we solve for facility managers and why they bring us in, and I'll touch briefly on why we're different and keep gaining new clients. Then I'd like to turn the tables and ask your questions to find out more about your situation and what you're doing in QRS or how you're approaching XYZ opportunity.*

*Depending on what I hear from you, I'll share a couple of relevant case studies or show you a few options of how we provide ozone aggregation. After that we can discuss if it looks we might be a fit to help you, or if there is a logical next step.*

*That's what I was hoping to do today, Ron. Tell me what what you were hoping for and what you'd like to walk away with today.”*

Either approach is fine. Just make sure you ask your prospect what they want to talk about.

## **7) They ignore what their prospect wants to talk about.**

Too often, salespeople are a slave to their own process. Either the process has been mandated or they aren't comfortable deviating from it.

Don't believe me? The next time a salesperson calls you, ask them why they're asking a specific question. Whenever I've done this, I've found that newer, more junior reps stumble because they don't know why they're saying what they're saying -- they just can't break from their plan.

Do yourself a favor and be prepared to talk about whatever your prospect wants to talk about. For example, [Research shows that more and more prospects want to talk about price and product on the first call](#), but many reps struggle to address these areas before qualifying budget and authority.

Reps need to know how to have these conversations without disqualifying themselves from the opportunity.

## **8) They have an inflexible agenda.**

You won't find many people that are bigger proponents of having a well-defined, documented sales process than I am. But sales opportunities rarely follow the same linear path.

Sometimes, it makes sense to give an educational presentation to a prospect or guide them through a free trial of your product before qualifying them fully. This way they'll more willing to tell you which business goals they're hoping your product will help them achieve.

You must understand your prospect's buying process before you can influence it. For many buyers, you must demonstrate your ability to adapt to their buying process before they'll adapt to your sales process. If your short-term agenda is set in stone and you're unwilling to let your prospect influence it, you risk losing the chance of influencing their long-term plan.

## 9) They forget their own agenda.

While it's critical to ask your prospects what they want to talk about and incorporate those topics into the agenda, it's also important for you to have a goal for every sales call as well. Otherwise, you can waste a lot of time talking to tire-kickers.

If you're truly helpful, buyers will want to talk to you regardless of whether they plan to buy or not. But as a salesperson, you have to spend your time with prospects most likely to buy. In the early days, buyers would book time with us just to learn how to do internet marketing -- and to a certain extent, we'd oblige. After all, it was in our best interest to shape a prospect's digital marketing plan. Once they began following our advice, it was easy to transition into a conversation about how our product would help them implement our advice more easily and effectively.

If you sell consulting, training, professional services, or a complex product, I'd encourage you to freely give advice to prospects in order to influence their plan. Just don't take it too far. It's important to determine who is a likely buyer and who is just trying to learn enough to execute your strategies themselves or with a competitive solution.

As an example of what not to do: We had one salesperson who understood internet marketing very well and were on the phone all the time. You could find his name at the top of the charts for two years straight. But for some reason or another, he stopped shaping agendas for his calls. He'd talk with prospects for hours about whatever internet marketing topic they wanted to learn about. He'd let them guide not just one conversation, but multiple -- sometimes the entire process! He'd practically give them a mini-MBA in internet marketing if they asked for it. Even when faced with being terminated for lack of performance, he didn't change his ways. The

fix -- proper agenda-setting -- was so simple, and plenty of people tried to help him, but for some reason, he just didn't do it.

Don't suffer this fate. Make sure you know what you need to get out of calls to ensure you're spending your time with qualified buyers.

## **10) They wing it.**

There's no one perfect script for setting an agenda. But winging it isn't effective either.

Split the difference by having a customizable script for setting your agenda.

*“Typically, a good goal for this call is to really figure out how I can best help you. I’ve worked with X companies like yours who were struggling with the challenge you’ve acknowledged. I can certainly share some advice based on my previous work with them, but I find that everyone is a bit different. So it usually makes sense for me to gather more context around your goals and learn about other challenges you’ve faced or anticipate facing, any relevant plans you have in place to overcome XYZ challenges, as well as timelines and other constraints you might have. Are you comfortable having that conversation today?”*

*“I suggest we treat this conversation like a two-way dialogue. I have a bunch of questions for you. I’m sure you’ll have some questions that I will answer for you. Then, at the end of the call we can decide whether it makes sense for us to continue discussing how we can more formally help you. Does that sound like a good plan to you?”*

In short, have a standard agenda-setting spiel that you can customize based on what you know about the prospect already, what you want to learn on the call, and how you want to position the value of your offering.

## **11) They don't set their next agenda based on what happened on the call.**

Qualifying a sales opportunity effectively can rarely be accomplished on one call. The key to maintaining control of a sale and gaining insight into whether a prospect will buy or not is to have a full picture of their situation. If you haven't yet captured that full picture, you need to continue talking to them until you do. Always be prepared to offer more value on a future call in order to grab their interest.

Every salesperson should have a set of predefined agendas for different situations. You should have your standard agendas for exploratory calls, planning calls, proposal review calls, and any other step you might have in your process. However, I'm also a big fan of pre-defining multiple, optional qualification calls in your sales process that you are prepared to conduct in any given sales pursuit.

Here's an example. Back in the day, a primary pitch was "helping companies grow traffic."

When a prospect had bought in to improving their approach to search engine optimization, but they weren't quite ready to complete our payment authorization form, I'd offer to schedule a call with them to do keyword research for their website.

Whether you're setting the next call in your standard sequence or an extra call so you can continue qualifying the opportunity, always be ready to propose next steps that are helpful for the buyer.

## **12) They fail to discuss the likely outcome of the call up front.**

To ensure you're spending your time wisely, ask your prospect to be prepared to make a decision at the end of your call. Too many sales processes end in "um ... maybe" or prospects going dark. By establishing an "upfront contract," you can ensure that your prospect will be honest with you about their likelihood of purchasing your product or service.

This doesn't mean you'll necessarily ask them to buy at the end of an exploratory call. Like setting the agenda, the decision at the end of the call must be something the prospect will agree to make.

***“Determine at the beginning of the meeting or telephone conversation what you both mutually agree will happen at the conclusion of your time together.”***

In most cases, the decision point is simply to determine whether it makes sense to move forward in their buying evaluation or not, and take the next step -- whatever it may be. According to Sandler, "letting them know up front what is going to happen in the time you're together will save time, eliminate the prospect from giving you a vague response as to what happens next, and [advance] the selling process or conclude there isn't a fit for your product or services."

## **Set Sales Call Agendas Effectively to Optimize Your Time With Maximally Qualified Buyers**

If salespeople could make one wish, they'd wish that their funnel would consist only of buyers destined to become large, profitable customers.



Sans magic genie, salespeople need to rely on their skills to sort these perfect customers from the time-wasters. One of the easiest ways to do that effectively is by setting a solid agenda that helps both parties determine whether there is a fit.

As the list of twelve mistakes above show, there's lots of ways to screw up agenda-setting. To make sure you're doing it right, here's a simple agenda-setting checklist to follow:

1. Set the agenda in advance of the call.
2. Assign your prospect homework so they are prepared to have the right conversation.
3. Do your own research and homework. Learn about your buyer.
4. Before setting an agenda, recap what you already know through previous conversations and research.
5. Build rapport in order to forge a connection and make your prospect more likely to oblige your proposed agenda.
6. Ask your prospect what they want to talk about and what they hope to accomplish during your call.
7. Incorporate what they want to discuss into the agenda.
8. Come to the call with a predefined, yet customizable way of introducing your agenda. Ensure that this framework communicates what you plan to ask, what you plan to share, and differentiates your offering in a way your prospect will value.
9. Have additional call agendas at the ready when you need to further qualify the opportunity.
10. Get a commitment from your prospect to make some decision at the end of the call.

What does your agenda-setting sound like?

How does your agenda setting process help you sort the serious buyers from the tire kickers?