

# cold calling techniques

effective cold calling techniques, tips and methods for selling and sales training

Cold calling is traditionally an early stage in the [selling process](#). Cold calling typically refers to the first telephone call made to a prospective customer. More unusually these days, cold calling can also refer to calling face-to-face for the first time without an appointment at commercial premises or households. Cold calling is also known as canvassing, telephone canvassing, prospecting, telephone prospecting, and more traditionally in the case of consumer door-to-door selling as 'door-knocking'.

Cold calling is an important stage and technique in the selling process. Cold calling abilities are also useful in many aspects of business and work communications outside of sales activities and the selling function.

Good cold calling - performed properly and not as merely an indiscriminate 'numbers game' - is a **fundamental and highly transferable capability**, whose basic principles are found in the behaviours and techniques of all great entrepreneurs and leaders.

**In essence cold calling is the art of approaching someone, professionally, openly and meaningfully, with a sensible proposition.**

All great entrepreneurs and leaders possess this ability or they would not have become successful.

Cold calling therefore enables success, chiefly because cold calling is strongly focused on initiative and action.

## cold calling is how you see it

Since selling became a recognised profession a couple of generations ago, countless sales training organizations, sales gurus, writers, theorists, and sales people of all sorts, have attempted to create effective cold calling techniques and scripts. There is no magic script, and while there are many helpful frameworks and methodologies there is no single magic answer.

**Successful cold calling - including the effectiveness of methods and techniques - essentially relies on your own attitude towards cold calling.**

Viewed negatively or passively, cold calling is merely a numbers game, where the sales person's calling (sometimes called 'canvassing' in this situation) is no different to a junk-mail leaflet. Somebody might respond - maybe one in twenty, maybe one in a hundred.

This is the way that unsuccessful sales people see cold calling. No wonder for them that cold calling is a painful grind. Depressing, embarrassing, draining, exhausting, just horrible.

On the other hand...

**Viewed positively and creatively , cold-calling is empowering and potent.**

Cold calling actually enables the sales person to:

- supersede existing suppliers
- pre-empt the competition
- identify and create huge new business possibilities
- become indispensable as someone who can make things happen and create new business
- build (your) personal reputation beyond job title and grade
- establish relationships and a respect (for you) beyond normal sales responsibilities
- and be an entrepreneur.

So, do you want to be the human equivalent of junk-mail, or do you want to achieve entrepreneurial reputation and success that will take you anywhere you want to go?

Like so many other aspects of business, management, and especially selling, cold-calling is how you see it, and whatever you want to make it.

## the enormous potential of cold-calling

It's worth making a big effort to see cold calling in a different way because it is both a key to personal success and to business success.

Why does cold calling hold so much potential?

Cold calling uniquely:

1. positions you in a crucial pivotal role - you are an interpreter, translator, controller
2. is the key to new fresh opportunities - business and anything else
3. and more generally the cold calling capability empowers you to define and determine and take control of your own future.

Cold calling by its nature opens business opportunities that are new, fresh, 'shape-able', free of baggage and history, and not weighed down by unhelpful patterns and expectations, etc.

Also, cold calling situations can largely be of your own making.

You are in charge. You own it. You can define each situation as you want - even if apparently you are quite constrained.

Believe it - people who are successful at cold calling can very quickly become extremely independent and powerful.

Your cold calling activities can create effectively a new 'virtual' business for yourself, within the organization or project, as if it were your own. This especially applies in B2B (business-to-business), where business opportunities are unlimited.

This is because cold calling is the life blood of all business - and any organized activity. Without it nothing happens. Even in largely automated businesses the automated systems would not have first come into being without someone doing the necessary cold calling. And nothing would develop or improve without someone being able to use basic cold calling skills to instigate the changes.

Cold calling dictates what happens, to whom, when, how - and even if cold calling is positioned and managed as a lowly activity, as is often the case, two things are certain:

- **cold calling alone can create and be a business** in its own right - because cold calling is effectively the ability to **make things happen** - whereas every other business activity needs cold calling to start up and survive

- therefore **successful cold callers can go anywhere and do anything** - they are entirely self-sufficient and ultimately are not dependent on anyone or anything.

The philosophy applies in consumer businesses (B2C) too, where even if you are forced to work to a script or a strict list of prospects, you still have the opportunity to develop your own strategic ideas and style, which when successful can (if the organization has any sense) be extended into initiatives and campaigns for others to follow - placing you in a key role as a 'champion' or trainer or project leader. If the organization has no sense (some don't) then the successful cold caller can simply leave and start up by themselves, or step up to a bigger job with another employer.

Successful cold callers are always in demand. They can always make things happen - for themselves and for other people.

Contrast these opportunities and outcomes with those offered by existing or established business relationships, or where the selling process has already begun. In these more mature situations the scene has already been set, along with expectations on both sides. The project has a shape, a life of its own, along with the distractions found when supplier and customer are already engaged. The project managers or senior consultants who have to pick things up at this stage have very little of the freedom and flexibility enjoyed by the cold calling sales person.

As a cold calling specialist you will always have the greatest potential - because you are working with fresh open situations - making things happen. Making something from nothing. It's difficult to put any limited value on such abilities.

Significantly, cold calling situations are the natural preference of all entrepreneurs. Cold calling situations are the natural hunting (or farming) ground of all entrepreneurs.

This is another way to look at cold calling: it is the favoured approach of all entrepreneurs - and the reason most entrepreneurs choose to start up their own businesses - they recognise that the best opportunities are new ones.

Cold calling welcomes and makes the most of a blank sheet. Pastures new. No limits.

Seeing cold calling in these terms is 90% of the personal battle to be successful at cold calling.

To enable cold-calling to be this liberating - especially within an employed role - you have to make it so. You have to want to put your own personal stamp on things. To be creative, adventurous - to see beyond the script - beyond the conventional "we've always done it that way..."

Cold calling is an invitation to adopt the mind-set and ambition of an entrepreneur - to see cold calling as the key to opportunities and personal achievement, to independence and choice.

With the right positive attitude to cold calling then rejections cease to be problems. Resistance ceases to be insurmountable. All obstacles become instead welcome steps towards success and achievement. The challenges are now the essential experience towards inevitable success.

## **cold calling - controlling, strategic, empowering**

The sales person's role between supplier and customer is the most significant and pivotal at the cold calling stage.

The sales person's influence in leveraging something from nothing is at its highest point.

Cold calling determines fundamentally whether something happens or not.

Cold calling can also then decide the nature of the proposition, the fit between supplier and customer, the way the relationship is defined and can develop - all these and more can be defined by the sales person at the cold calling stage.

When we examine cold calling more deeply we understand why.

More than all the stages in the selling process, the cold call enables the sales person to interpret, to define and to command the situation - just like the conductor of an orchestra.

The sales person at cold calling stage determines the interpretation, direction and cooperation between customer and supplier.

This - rather than merely delivering a script to a list of contacts - is the sales person's role and opportunity at the cold call stage.

See and understand the fundamental significance of the '[1st Law of Cybernetics](#)' - it relates strongly to cold calling. The 1st Law of Cybernetics states that "The unit within the system with the most behavioural responses available to it controls the system".

Think of the system as the supplier, the potential customer, and the market-place, including the competitors and all influencing market factors.

Ask yourself, of all the people involved in the customer and supplier organizations, who is best positioned to view and respond to the overall system? Not the CEO's, not the managers, not the technical project managers. The person best positioned to see and adapt to the whole system is the cold caller. Only that person has the breadth and depth of view back inside their own organization, and also outwardly into the prospective customer organization. The cold caller is the single pivot - the main connector, interpreter and translator - between supplier, prospective customer and all the other market forces. (Sharon Drew Morgen's excellent [Buying Facilitation](#) methodology exploits this very principle, i.e., the sales person has the crucial overview.)

Having this view of the overall system, combined with the fresh open nature of cold calling situations, is what makes cold calling so commanding and powerful.

Merely understanding this helps immensely to adopt an empowered and strategic approach to cold calling.

## why it's good that cold calling is so difficult for most sales people

Cold calling is traditionally the most challenging part of the selling process.

Moreover, for most sales people cold calling is becoming increasingly difficult - because the prospective customer's time is increasingly pressurised and therefore increasingly protected, and so cold calling sales people are increasingly resisted.

Prospects and decision-makers are increasingly difficult to reach, on their guard, and very sensitive and resistant to obvious 'sales techniques'.

Consequently the sales person feels extra pressures, not helped by scripted or contrived language, or an over-zealous sales management or system, which understandably creates a feeling in the prospect of being pushed or manipulated. In these circumstances any hope of forming vital trust is of course lost at this point, and recovery is virtually impossible.

**However, sales people who adopt a positive and skilful approach to cold calling generally find that cold calling becomes easier.**

This is because cold calling itself is influenced hugely by market forces, i.e., all the other cold calling sales people attempting to do it.

**The more difficult cold calling is for the majority, then the easier it becomes for the successful minority.**

If the cold calling challenge were easy, then it would be easy for everyone, and therefore very difficult to achieve differentiation or advantage, to stand out, to be noticed and respected and valued - to succeed.

Your aim is to be one of the successful minority.

Then you will be thankful for obstacles and challenges because they'll block the competition, leaving you free to focus on the business opportunities and adopting a solid strategic approach towards achieving the best outcomes.

## **cold calling - changing your perspective changes cold calling**

When we look at what actually happens - and can happen - during the cold call, we see why the cold call stage of the selling process is so potent and full of opportunity for the sales person.

When we stop looking at cold calling from the sales person's viewpoint and from the customer's viewpoint, and start seeing it from a business perspective, cold calling becomes a wonderful opportunity that any one can enjoy and optimize:

<b>how sales people typically see cold calling</b>	<b>how customers see cold calling done poorly</b>
<ul style="list-style-type: none"><li>• fearful</li><li>• boring, repetitive</li><li>• unpleasant</li><li>• pressurised</li><li>• unimaginative</li><li>• rejections</li><li>• thankless</li><li>• confrontational</li><li>• unproductive</li><li>• demoralizing</li><li>• unhappy</li><li>• numbers game</li></ul>	<ul style="list-style-type: none"><li>• nuisance</li><li>• unwanted</li><li>• indiscriminate, unprepared</li><li>• pressurising</li><li>• tricky, shift</li><li>• dishonest</li><li>• reject, repel cold callers</li><li>• shady, evasive</li><li>• contrived</li><li>• insulting</li><li>• patronizing</li><li>• disrespectful</li></ul>

Obviously the aim is to move cold calling behaviours and methods into the third column, and definitely to stop anything which produces the feelings and effects of the first and second columns.

This is partly achieved by changing **methods and techniques** - and in some cases **adapting or using scripts quite differently** - but more so **changing attitude and style**.

Changing attitude and style - behaving as a helpful strategic enabler rather than a deliverer of verbal junk-mail - will automatically start to re-shape your methods and techniques.

## cold calling techniques - underpinning principles

Important basic cold calling techniques are:

1. **Preparation** - self, environment, knowledge, and who you represent
2. **Introduction** - key phrases explaining and positioning yourself and your purpose
3. **Questioning** - help, facilitate and enable rather than assume, sell and push
4. **Objectivity** - the mark of an advisor - do not sell
5. **Listen and interpret** - do not sell
6. **Inform and educate** - do not sell
7. **Involve and coordinate** - do not sell
8. **Keep in touch** - keep notes and keep informed - keep ultimate ownership (by now you will probably be selling)

You will notice an over-riding theme of not actually selling during the cold calling process. Arguably of course all of this theory is selling of a sort, but it is not selling in the traditional sense of pushing, telling, advancing the features or benefits of your own products or services. Generally the aim of cold calling is simply to open dialogue, to get to first base, and possibly (if it suits the prospect) to make an appointment for further discussion and exploration.

**An appointment need not be a face-to-face meeting.** It can instead be an appointment to talk on the telephone again. Or a conference call. Or a video conference. It should be whatever suits the prospect's needs and processes and situation.

### 1. preparation

Preparation for effective successful cold calling is in three parts:

1. the supplier/product/service you are representing
2. your mental approach - the way you see yourself and the cold calling activity
3. and your understanding of your offering/proposition in relation to your prospects and their situations.

In detail:

#### 1.1 Ensure you are representing a good quality ethical supplier/product/service

Your products and services do not need to be the most expensive or highest quality, but they **must be completely fit for purpose for the given market and application**, and they must meet the expectations created by your marketing and advertising communications. Similarly your organization does not need to be the most ethical and socially responsible and environmentally friendly on the planet, but again the ethical standards of your organization must meet the reasonable expectations of your target market. If either of these criteria is not met then you are building on sand and you should find another supplier or product/service to represent.

#### 1.2 Your mental approach - the way you see yourself and the cold calling activity

Read and absorb the notes above. See cold calling as strategic and empowering, and yourself the same. Leave behind any temptation to treat cold calling as an indiscriminate or impersonal numbers game. If you want to succeed at cold calling then embrace it as the powerful process that it is and aspire to be great at it. Address and alter other factors which affect your attitude and mood for cold calling, for example:

Your **working environment** (change it to suit yourself and the cold calling activity as far as you can - see tips in [time management](#) especially). Standing up rather than sitting can make a remarkable difference, as can [posture and ergonomics](#) of desk and equipment.

Avoid behaviours that add to your stress levels. Eat and drink properly. Exercise. Take breaks. Manage interruptions and other demands. Cold calling is much easier when you are relaxed, fit, focused and free of distractions.

Have some personal goals and aims - whatever is meaningful and achievable - aside from whatever daft targets might be imposed from above - incorporate cold calling into your own personal career plans and aspirations. Focus on developing your ability, confidence and experience in dealing with ever more senior people, and discussing issues on an ever more strategic level.

Visualise how you want to be regarded by the people you speak to - and you will grow into and live up to that image. For example: "People I speak to will regard me as a highly professional business person - beyond a sales person or a telephone canvasser - they will think of me as someone they can trust - an expert in my field, someone who can enable improvement, clarity, cooperation, solutions, etc., completely irrespective of my actual job title." See the [assertiveness](#) and [self-belief](#) pages.

### **1.3 Your understanding and wording of your offering/proposition in relation to your prospects and their situations**

You must understand your business extremely well. If your boss tells you that your job is simply to 'get leads' and not to bother with knowledge about anything else (for example products and services, the organization you represent, the market, the competition - see [Porter's Five Forces](#) for a much wider strategic list) then find another employer. Your usefulness to the market is defined by the way you help reconcile needs with information. Your success is ultimately limited by your knowledge. So inform yourself. Become expert, and the world will open up to you. You must also research large organizations before calling them. For all organizations, large and small, you must prepare and understand well your initial or basic proposition - whatever it is - as it relates to the organization and/or the organization's situation. This might not require you to research the prospective customer in any great detail, especially if you are calling domestic consumers, but **you must have a good strategic appreciation of the issues faced by your prospect in relation to your basic opening proposition**. This is an absolutely fundamental requirement and when omitted will drastically reduce the effectiveness of cold calling. The prospective customer has a very keen sense of what is important to them and what is not - and if you fail to acknowledge this in your opening exchange, or worse demonstrate personal ignorance about their perspective - then your cold call go no further. **Bear in mind also that your basic or initial proposition should not make assumptions as to the final offering or product/service specification, which, especially in the case of large organizations might be several weeks or months away from defining**. And even in the case of simple small supply situations, the customer must necessarily be involved later in the selling process in defining the precise specifications. So instead, your opening or initial or basic proposition must be of a strategic quite general nature, but at the same time sufficiently important, different, new, interesting, etc., in order to be worthy of continuing the dialogue and exploring possibilities in greater detail. This crucial strategic positioning is typically achieved by refining several different short introductory statements, or questions, which you can mix and match according to the situation. It comes with preparation and practice, and constantly seeking and adapting the words that you use to achieve the desired results. You must write down these phrases as you develop and refine them.

Most sales people fail to do this - and then they wonder why their opening statements don't work. See the [sales theory page](#) and especially the section about the '[product offer](#)'. **Your opening proposition in the introduction should be a broad strategic interpretation of your more detailed product offer - this is both to save time and also to avoid making assumptions about what the prospect actually needs and how the final proposition might eventually be formulated.**

## 2. introduction

Be very clear and concise about who you are and the purpose of your call, and have a powerful strategic basis (your main reason) for requesting dialogue, now or to be scheduled later, depending on the availability of the other person at the time. Base your opening proposition on your more detailed product offering, but keep it concise and strategic - not detailed and specific. See the guidance and explanation about [product offers, propositions and benefit statements](#) on the main [sales training page](#).

## 3. questioning

Prepare and ask good facilitative questions which help the other person to see the situation more clearly, and which invite them to consider and explain how they decide about such issues. Sharon Drew Morgen's [Buying Facilitation](#) methodology is particularly helpful in developing superb and helpful questions.

## 4. objectivity

Remain fair and neutral - objectivity is the mark of an advisor. It's a tricky thing to do given that you are selling your products and services, but ironically the more you 'push' your own solutions and services, and the more you denigrate or criticize the alternatives, then the more you will damage your chances. People don't want to be 'sold' - they want to be helped and guided by an expert in a particular field to make and then implement an informed decision. This of course makes it important for you to be representing a supplier or products/services which are genuinely excellent. If you act on behalf of a crappy or unethical supplier then you will ultimately damage your own personal reputation. This comes back to very early preparation - you can afford to be objective only if you represent a good quality supplier.

## 5. listen and interpret

It is far better to listen and interpret from the customer's perspective, as would an expert advisor, rather than act as a biased one-sided self-interested sales person. The former behaviour is helpful and appealing - giving - whereas the latter traditional pushy sales approach is seen immediately for what it is - taking. Remember your visualised image of yourself: how you want people to see you, and behave like it.

## 6. inform and educate

You are the expert in your service or proposition or technology (not necessarily in great technical detail, but strategically, in overview definitely) and if you are not then you need to be, otherwise you are wasting your prospect's time. Giving information and fair and useful feedback - educating effectively - in response to customers' requests for answers is much better than leaping in to 'close the appointment'. It's not a race or a rush. The aim is to build understanding and identify whether

there is a potential useful fit between what you can offer and what the prospect might need. Do this and the situation quite naturally develops. Focus only on the appointment and you'll tend to skip the all-important stage of establishing yourself as a helper, information-provider, and enabler.

## 7. involve and coordinate

Involve the prospect in the discussion and decision to move to the next stage. Ask how they would find it most helpful to explore or move matters forward. Be guided by the prospect and also be guided by your own organizational systems and protocols. The prospect knows their systems and processes; you don't. Identify how the situation can be coordinated in order to progress things. You are the pivotal person. Revisit the [cybernetics](#) principle. You must aim to be the unit in the whole system which orchestrates events and people - on behalf of your prospect - to achieve what the prospect needs in terms of process and outcomes. This is your value to the prospect. You are the bridge, the interpreter, the enabler. Aspire to this role and you will begin to acquire a personal value and reputation greater than anyone.

## 8. keep in touch - keep notes - keep ultimate ownership

Information and knowledge are crucial to your ability to act as interpreter and coordinator at the start of the cold calling process.

You must therefore take full notes and keep clear records of the cold call at all stages.

You should also take notes or keep yourself informed as the situation develops, whether the development of the opportunity remains your responsibility or not.

If you stay informed and knowledgeable about the resulting sales relationships then you can keep a watchful eye on situations, and thereby grow your personal standing and role beyond canvasser or sales person.

This is not to say that you must be 'hands-on' involved at all times. On the contrary; your role as coordinator - together with the systems and processes within supplier and customer - should ensure that other people are brought into the situation as required to progress and develop the opportunity and the trading relationship as it grows.

You are however the ultimate owner of the relationship and responsibility - whatever your title - if you want to be.

How you meet your commitments to your customer counts more than your job title or job description. It's a matter of personal integrity and professionalism.

Staying involved and informed is not easy in certain organizations which rigidly compartmentalize sales and after-sales activities, especially sales organizations which marginalize cold calling or canvassing teams, but whatever structures exist, you should try to maintain an awareness and background involvement - especially with large customers - whenever and however you can.

You have a responsibility for all relationships that you begin: to your customer contacts - and arguably a personal commitment which transcends organizational systems and policies. Many customers, especially personal contacts who put great faith in you at the beginning of the relationship, will expect and appreciate your staying in touch - if only as a last resort in the event of unresolved problems.

For junior people this is not always easy, but retaining an informed and ultimately responsible interest in relationships that your cold calling instigates, is the sort of behaviour and determination on which great careers and reputations can be built.

This last piece of advice might not fit the divisionalised sales processes of certain organizations, in which case if you personally are serious about building a career in selling or business - or if your organization is serious about developing people - then you might discover that your cold calling activities will benefit from defining them more in terms of personal integrity and commitment than mere numbers on a board.

## successful cold calling - methodology example

As already explained, the best cold calling methods tend to focus on developing open honest trusting dialogue, which in turn enables a climate of trust, within which progress can be made further into the sales process.

Among the best examples of effective new transferable and learnable cold calling methodologies, is the thinking of sales expert Ari Galper, who with his aptly named model Unlock The Game®, has done much to develop the cold calling specialism in the sales training and development field.

Here is a summary of Ari's excellent methodology directly from his Mastery Program, reproduced here with his permission, which is gratefully acknowledged.

Galper's ideas are effective and ethical, based on a philosophy that positions selling in the area objective advisor, mediator, translator, trusted expert, etc., rather than the traditional image of persuader, manipulator, chaser, pusher, etc., which behaviours are no longer effective for achieving sustainable good quality selling and business.

### summary of ari galper's cold calling methodology

Ari Galper's model is called Unlock The Game®, which he describes as "A new cold calling and sales mindset focused on building trust."

1. **Shift your mindset away from 'making the sale' towards whether the fit exists or not.** Look for what the other person is thinking and whether there is actually a real possibility of a fit. Do not assume they should buy what you have. Aim to **qualify**, not force or persuade.
2. **Be a helper not a pitcher.** Help your prospect, instead of referring to features and benefits - this centres the conversation on the other person, not you.
3. **Focus on the beginning - not the end.** Be sensitive to the early interaction with your prospect - keep your mindset and behaviour stay in the present moment (with the client) and avoid pushing forward (where you want to go - which you can only guess at best).
4. **Stop chasing prospects - behave with dignity.** Create an open pressure-free atmosphere - set a tone of equality and mutual respect - strive to be regarded as a helpful human being instead of a typical sales person.
5. **Connect with your prospects rather than work through a list.** Focus on how to make a true connection with each prospect - this naturally helps build trust - think about and discuss their issues, not yours.
6. **Creating trust with your prospect is your primary goal - not making the sale.** Creating genuine trust is the essence of building real relationships and real relationships turn into more sales.
7. **Diffuse any pressure that you sense in the sales process.** By diffusing the tension and pressure in the sales process between you and your prospects, you bring both of you closer to an honest and truthful conversation.

8. **Change your languaging away from 'sales speak' to natural languaging that connects with people.** By using phrases like 'would you be open to' instead of 'would you be interested in', you immediately set yourself apart as someone who is patient, open minded and willing to listen.
9. **Understand your prospect's problems deeply so that they feel 'understood' by you.** By having a deep understanding of the problems that your prospects experience everyday, the easier it will be for you to really feel that you know and care about their situation.
10. **Use the Unlock The Game Mindset** - both in your business and personal life because relationships are the same in both worlds. By also applying these principles in your personal life, with people you care about, you'll begin to see a deeper trust being built that can strengthen your relationships for the long term.