How To Avoid Burning Good Prospects:

- ❑ The phone should NOT ring more than 3 times before it's answered. Any longer and you risk having the caller hang up.

- ❑ Record EVERY call that comes into your office and REVIEW them weekly to ensure the person answering the phone is handling the calls correctly.

- ❑ Do NOT use, or allow your team to use, a cell phone to answer your calls. It sounds like garbage and makes it seem as though you're "small" and unprofessional.

- ❑ Treat every lead as a "5-star" lead UNTIL they prove otherwise. Be VERY careful about dismissing a lead as "not qualified" because they are asking how much you charge or are looking for you to simply fix a problem.

- ❑ All calls MUST be answered LIVE by a person, NOT a voice prompt. Here is a REAL e-mail that was sent to us by a member:

  We use a virtual receptionist company to answer our phones, especially Google calls. Today, we received a call where the receptionist answered. She tried getting in touch with us to put him through but we weren't available, so she began taking down the caller's info. He divulged that he was an $80 million company. They have 11 locations. They have 17+ "internal companies." He went on further and informed her that he had called 5 IT companies. This was his 5th call. He only got to them because none of the other companies had answered their phones. They all went to automated systems or voice mails. He told her, "Tell your boss he will go a long damn way in life because he answers his phones live."

- ❑ The goal for anyone answering the call is to get that prospect to a <u>competent salesperson</u> ASAP. If a salesperson is not available, just tell them to take down the caller's full information and book the appointment. DO NOT:
  - Put them on hold forever.
  - Put them into voice mail.
  - Offer to have someone call them back.

- ❑ Do NOT allow a minimum-wage, untrained, unscripted person to handle inbound calls. Remember, this is the first impression a client will have of your company! Give the person answering the calls a script and then review all inbound calls weekly to ensure they are actually FOLLOWING the script and process you've outlined.

- ❑ Give your clients a *different* support phone number (tech hotline) than the one you're using for marketing and/or Google AdWords. Next, give them desk paraphernalia (mouse pads, sticker on their laptop, calculator, coffee mug, etc.) with the "tech support hotline" on it. This will cut down on them looking you up in Google and clicking on your ad to find your phone number.

Phone Answering Process And Scripts:

Purpose:

- ✓ To qualify and make sure you aren't wasting time with low-probability prospects.
- ✓ To position yourself as a true professional.
- ✓ To build excitement for your meeting with the client.
- ✓ To ensure NO OPPORTUNITIES ARE LOST due to mishandling.

Prospect Calls In And Is Answered LIVE:

RULES:

- The phone must be answered by a live person.
- The phone must not ring more than 3 times before someone picks up live.
- The person answering the phone must speak clearly and cheerfully.
- The prospect should NEVER be put into voice mail; use some type of instant messaging to see if a competent sales rep is able to pick up that call.
- If no one is available to pick up the call, ALWAYS BOOK THE APPOINTMENT.
- Someone MUST own this process to ensure it's being done correctly and accurately.

SCRIPT AND PROCESS:

A prospect calls in and says something like *"Hi, I'm calling to talk to someone about <<blank>>."*

The Response Is ALWAYS: "Excellent, I can help you with that!"

- First, may I get your name and the company you're calling from? Is that here in <<City>>? Great, thanks, <<Name>>. Are you the owner?
- And may I ask your phone number…just in case we get disconnected when I transfer your call? Thank you!
- And finally, how did you hear about us?

If The Sales Rep Is Available: Thank you for that information! Let me transfer you over to <<Name>>, who is our <<Title that is NOT sales; example: Director Of Client Support>>. One moment please…

<<On-hold commercial of audio testimonials or you speaking should be playing, talking about your specific USP, guarantees you make, etc.>>

If The Sales Rep Is NOT Available: "Thank you for that information! Can you tell me a little bit about what you need help with?" <<Let them explain while you take careful notes.>>

"Okay, the best option is for me to schedule <<Name>> to come over to your office and take a look at what's going on and talk to you in person about how we can help. <<Name>> is our <<Title: Director of Client Support>>. I can get him/her over there later today if that will work for you, or tomorrow morning?"

BOOK THE APPOINTMENT:

- Get the address for the appointment and enter it and all contact information, details of what they need help with and how they heard of us into <<CRM>>.
- Create an online Shock and Awe for them.
- Send an Outlook Calendar meeting request and include the Shock and Awe link.
- Notify <<Sales Rep>> immediately and cc them on all e-mail correspondence.

"Excellent. So I've got you all set to meet with <<Name>> at <<Time>> on <<Day>>. I'll give him all this information and will send you an Outlook Calendar invite with some pre-meeting materials that will outline who we are, how we work and answers to some frequently asked questions you might have. Is there anything else I can help you with? Okay, we'll see you on <<Date>>!"

Qualification And Preparation Questions:

IF THE APPOINTMENT WASN'T QUALIFIED YET:
"Hi, <<Name>>, this is <<Your Name>>, <<Director Of Client Support>> here at <<Company>>. I'm going to be the person coming out to talk to you about <<problem>> on <<date>>. I was prepping for our meeting and had a few quick questions. Do you have a minute?"
<<Modify the questions and script below as needed and qualify the lead.>>

IF THE CALL CAME IN LIVE AND YOU ANSWERED:
"Hi, <<Name>>, this is <<Your Name>>. How can I help?"

<<Let them respond and tell you what's going on. Usually they'll tell you what the problem is. Ask a few clarifying questions if necessary. Unless you KNOW you can't help them or don't want to help, don't dismiss them just yet.>>

"Okay, can I ask you a few questions?"
<<Note: These are some basic questions to give you a feel for the situation, what they're looking for and whether or not they'll be a right fit. Add or subtract as you see necessary. If they're having an immediate problem, go to the "What To Do If They Are Experiencing A Major Problem" script in this document.>>

- <u>If they were referred to you</u>, say, "So I understand you were referred to us by Joe Smith… What did Joe tell you about us?"

- Can you tell me a little bit about your business and computer network? Servers? Workstations? Laptops? Operating system? Any critical applications you use? Do you recall when your server was installed or how old it is? *<<Expand or contract these questions as needed; don't get too deep into the weeds on this one.>>*

- What have you done to try and resolve these problems to date?

- <<If they don’t answer this from the above question>>: I’m curious…who’s been supporting your network up until now?

- May I ask why you’re unhappy with <<that arrangement/their services>> and looking elsewhere? <<This will give you key insights into why they’re looking.>>

- <<If they are outsourcing to another company>>: When you told them about these issues to resolve <<the problems>>, how did that go?

<<Now that you’ve identified some key problem areas, you want them to be anticipating your visit and excited about what you’ll be able to find and deliver. Make this statement with GREAT confidence and a bit of excitement in your voice.>>

“Okay, great! From what you’ve told me, it sounds like we can definitely help you <<resolve X, Y and Z>> issues you’re having.”

<u>Close For The Appointment</u>:

I can be out there <<tomorrow>> at ______________ o’clock, or ___________ at ______________ o’clock. Which works best for you? Where are you guys located?

Great. One more thing… In addition to yourself, who else is involved with the decisions about your computer network? <<Clarify who the person is they named if they didn’t tell you: “Is Joe the owner?”>>

Great. Can you please make sure that <<Joe>> is present at our meeting? I’ll definitely have some questions for <<him>>.

Excellent. So I’ll be coming out to your office at <<address>> on <<date>> at <<time>>. I have a package I’m going to send to you prior to our meeting; I’ll send it overnight FedEx so you’ll have it first thing in the morning. If you would, please have a look through it before we get together and <<listen to that 12-minute CD in preparation for our meeting. Our meeting will go a lot faster, and it will answer a number of the questions I’m sure you have about us and how we work>>.

I’ll also e-mail you a confirmation for our meeting date and time. Is <<e-mail>> the best e-mail for you? What is <<other decision maker’s>> e-mail?

That’s it! Do you have any questions for me prior to meeting?

Excellent! I’m looking forward to seeing you at <<time>> on <<date>>!

Notes On Getting The Decision Maker To The Meeting:

If the call was handled properly when it came in, you should already know if they are the owner or not. If they are NOT the owner or the key decision maker you're used to working with, it's important that you push for the key decision maker to be in the meeting. Otherwise, you're starting from a position of weakness, and the chance of closing the sale is suppressed. This is ultimately your call to make; if you choose to require the decision maker to be there, here's a script you can use:

"One more thing… In addition to yourself, who else is involved with the decisions about your computer network?" <<Clarify who the person is they named if they didn't tell you: "Is Joe your IT guy? Is he the owner?">>

"Great. Can you please make sure that <<Joe>> is present at our meeting? I'll definitely have some questions for <<him>>."

<<If they say Joe cannot be there>>: "Okay, let's reschedule to make sure <<Joe>> can be there."

If They Say The Decision Maker Cannot Be There, But They Want To Move Ahead With The Appointment Anyway: If they tell you that a key decision maker (like a CEO) is NOT going to be in the meeting and does NOT need to be there, this is most likely going to be a low-probability prospect. **Use this sound bite:**

"<<Name>>, I appreciate your position on this and, from my experience in doing this for quite literally hundreds of businesses like yours, I know that not having <<your CEO>> in the meeting is going to end up being a problem, and here's why: in my <<X>> years of doing this, I've never met a company CEO who did not want to get involved at some level in the decision about who they outsource their support to, or who wouldn't have questions, at the very least, about who we are and what they would be paying for.

Also, part of our discovery process is to conduct a <<network assessment>>, which may require us to access your server and backups. We don't feel comfortable doing that without the CEO's blessing. Plus, if we're going to be supporting your computer network, I take that very seriously and have to be able to ask your CEO a few questions.

That's why I really need them in this first meeting. I'm sure they are going to have questions about us and our services; but more importantly, *I* need to have them there to ask *THEM* questions that are very important to the type of solutions I recommend – and without knowing what's important to them and getting their answers to a few key questions I have, I don't feel comfortable moving forward because I don't believe I can provide you the best advice. What would you like to do?"

IMPORTANT SALES TIP!

If you aren't flooded with new leads and appointments AND you need practice selling face-to-face, I suggest you take leads that are NOT "slam dunk" opportunities so you can improve your sales presentation skills. Once you're great at closing and have sufficient lead flow, you can be choosier about the prospects you'll meet with.

Prospect Is Entered Into Your CRM:

- [ ] **Full name, address, e-mail and detailed notes on the initial call are recorded.**

- [ ] **An e-mail is sent to the prospect confirming the appointment; link to online Shock and Awe optional with video message.**

- [ ] **"Source" is updated for tracking purposes.**

- [ ] **Shock And Awe box is sent via FedEx:**
    - Cover letter confirming the appointment
    - Audio business card
    - Copy of your self-published book
    - Testimonial book
    - Copies of your newsletter
    - Brochure or tri-fold that includes a list of the services you offer, the types of companies you work with, a brief history of your company, your headshot and bio, and the bio and headshots of any other key owners or employees
    - Tear sheets, articles written about and by you, awards you've won or other credibility-building materials
    - Guarantee certificate or "Customer Bill Of Rights"
    - Free report(s) relevant to the prospect
    - One-page flyer that says, "X Things We Do Better"
    - Logo items (stress hammer, T-shirt, mouse pad, chocolate, candies, etc.)

Confirming The Appointment:

BEFORE you leave for your appointment, have an **assistant call the prospect** to confirm the meeting by saying, "<<Bob>> is on his way and should be there shortly." That way, if they're not there, or if they were thinking about standing you up, you'll know ahead of time and won't have wasted a trip. This is a good time to reaffirm that all decision makers will be present and that anything else you requested in your qualification call will be available.

If they say, "Oh, we completely forgot about that!" then have your assistant say, "Oh! Well, he's already left the office and is on his way. I'm not sure I'll be able to reach him in time before he gets to your office because he turns his cell phone off when driving." Usually that will have them say, "Okay, no problem." Don't offer to reschedule UNLESS you know for certain they won't be there; for example, if the receptionist tells you the prospect you're meeting with is out of town and not physically in the office.

What To Do If They Are Experiencing A Major Problem And Need Help Fast

"We're down and really need someone out here today!"
This is an area where you may need to be flexible about how you move forward. If someone has a network that is down or has a problem they need resolved ASAP, they probably just want you to come out and fix it rather than go through the full sales process (network audit) and wait for the results.

I would STILL take them through the qualification questions outlined earlier and I would still, at some point, conduct an audit and recommend a service contract, but to get your foot in the door and not frustrate this potential new client, you may want to offer to resolve their problem first before doing the audit.

EXPLAIN HOW YOUR SERVICES WORK

"I'm happy to send a tech out there <<today>> to do a free diagnosis. Here's how that will work…" <<Outline your process. Below is an example to get you started.>>

- When we arrive, we'll sit down with you for a few minutes to ask some questions to find out more about what's going on and answer any questions you have about us.
- At that point, my technician will present you with a signed confidentiality agreement and work agreement to get your permission to diagnose your network, and outlining our rates. It will also clarify that we won't be doing or changing anything on your network…simply taking a look around to see what the issue is.
- My technician will ask you to log them in to the server or workstation where the problem is to do a quick diagnosis. They will explain what they think the problem is and what the next steps are for resolving it. If we can resolve it right away, we'll provide you with a fixed-fee quote for taking care of it right then and there.
- Now, to be perfectly clear, you won't be under any obligation to buy anything at that point, but if you DO want him to move forward, my technician can try and service it right there on the spot – of course, whether or not we can fix it then and there will largely depend on what we find, but if we know what the issue is and we can fix it right away, we'll give you a no-hidden-fee quote on how to resolve it.
- Our fees will depend on what we find, how long it will take, whether or not we need to order parts and a number of other issues – and because there are so many variables, I simply cannot quote you anything over the phone because I just can't without looking at what needs to be done. But as I said, we'll quote you a fixed-fee price up front, and you won't be under any obligation – plus, I think you'll find our services to be very competitive; we're not the cheapest, but we're certainly not the most expensive either.
- Then, once we get your problem resolved and get you back up and running, we'll conduct a more thorough health check of your system to find out what else is going on and make recommendations on how we can prevent these issues from happening in the future.
- Would you like to schedule that right now?