

# Anatomy of a sales call

## Step 1: Call objective (Why are you calling?)

Have a clear reason for the call (new product, follow-up, upcoming event, etc.).  
Define what success looks like (meeting commitment to review materials, event registration, illustration request).

## Step 2: Pre-call prep (What do you know?)

Review customer relationship management (CRM) for past interactions, business focus and preferences.  
Check recent market trends.  
Anticipate potential objections and have responses ready.

## Step 3: Set the hook (What's in it for them?)

Lead with a compelling reason to engage (industry trend, exclusive opportunity, relevant data).  
Don't lead with firm/product.  
Keep it focused: Why does this matter to them? Remember to think, "What's in it for me?" (WIFM)  
Focus the hook on one or more of the three key drivers of decision-making: Time, money and self-interest.

## Step 4: The art of questioning (Guide the conversation)

Prepare questions ahead of time to lead the conversation where you want to take it.  
Prompt them to ask questions you can answer.  
Ask open-ended questions to uncover needs:

- What's your biggest challenge with [topic] right now?
- Why are you considering making [this change]?

## Step 5: Closing (What's next?)

Always ask for a next step (meeting, sending materials, event registration).  
Tie the features of your solution back to how they benefit them.  
Confirm follow-up action and timing.  
Thank them for their time.

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