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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.