

Seven Secrets to Cold Calling Success



BY JANE PORTER

David Ortiz, a trained chef who had been running his own financial-planning firm since 1997, renamed his business *Financial Chef* last year and started meeting with prospects over meals he'd cooked himself. Wining and dining potential clients certainly made Ortiz and his Miami, Fla., business stand out, but when it came to cold calling prospects, he was at a loss.



Plowing through 100 names a day, he'd be lucky to get two or three promising leads. He quickly grew frustrated, but with the help of a sales coach, revamped his strategy. Ortiz cut his number of calls by two-thirds, but spent more time researching and weeding out prospects before picking up the phone. Now, for every 25 cold calls, he usually gets five to seven meetings with potential clients. "It takes a lot more time, but the end result is that I am getting to more qualified and more willing prospects," Ortiz says.

Cold calling need not be a source of angst for small-business owners. Here are seven successful strategies from experts in the field:

1. Plan Ahead

Who will you be calling? When will you be placing your calls? These are questions you should answer the day before you make the calls, says [Stephan Schiffman](#), a New York-based corporate sales trainer and author of *Cold Calling Techniques (That Really Work!)* (Adams Media, 2007). He advises blocking out an hour every day for cold calls and sticking to that regular routine.

2. Investigate Before You Call

It may seem tedious, but doing homework on the person you're calling will make a huge difference. This can be as simple as doing a Google search on the company or looking up the prospect on LinkedIn, says [Sam Richter](#), author of *Take the Cold Out of Cold Calling* (Adams Business Press, 2012). If a Google search doesn't turn much up on the person you're calling, try [Mool.com/media](#), a search engine that scours both local and national media outlets for clips. "Even if you're not going to use the information, you will come across more confident and more powerful when you have information on the other person and their company," Richter says.

3. Seek Out a Personal Connection

Whether through online research or during the phone call itself, you should try to find a personal connection with your prospects. Your research might reveal that you share the same alma mater or have a past connection with the same company. During the call, you also might discover a common interest. "When I am talking to somebody and I am able to work the whole affinity towards food and cooking, it just absolutely changes the dynamic," Ortiz says.

4. Get Information Before You Give It

You should ask lots of questions during the call rather than immediately try to sell your product or service, says Art Sobczak, author of *Smart Calling: Eliminate the Fear, Failure and Rejection From Cold Calling* (Wiley, 2010). Learn about your prospect's business needs first, so you can more effectively tailor your pitch. "People don't care about you," says Sobczak, who coached Ortiz. "All they care about is what you can do for them."

5. Get Out of Your Chair and in Front of a Mirror

It might seem silly to watch yourself in the mirror as you talk, but a mirror will make you smile and smiling will make you more confident, Schiffman says. He also recommends standing up when making calls. "You'll feel better and more animated," he says. Using a tape recorder could also be helpful, as it'll help you gauge how you come across on the phone. Schiffman recommends recording all your calls and listening to them repeatedly, so you can spot problems and correct them.

6. Keep careful records

You want to keep records tracking who you called, when you called them and how many of those calls resulted in appointments. Measuring your progress will not only keep you organized, it will also give you a sense of accomplishment. While a call might not result in an immediate sale, you can always get something positive out of it, Sobczak says, even if it's just more information about the company or person. Write it all down because it might prove useful if there's an opportunity for a follow-up call.

7. Use Referrals in Your Voice Mail Message

More often than not, you'll be reaching voice mail rather than speaking with the prospect directly. To increase the chances of getting a call back, try to find a common connection you can mention in the message you leave. Social media sites like LinkedIn let you see the people your connections are connected to—a useful resource when looking for referrals, says Richter. If you know someone connected to the person you're calling, ask if you can use his or her name. "You're almost always going to get a call back when you have a referral that you mention by name," Richter says.