Improving your outbound calling

Following on from the very successful Webinar on outbound calling we thought we'd put together a more indepth factsheet to serve as a point of reference.

I fully appreciate that there is always more to getting something right than just reading a factsheet, but I hope this will at least have you on the right track.

It only works if you do it properly – this may sound silly but far too many people make a half-hearted attempt at outbound calling and then wonder why it doesn't work. As with anything else, if you approach it in a professional and prepared way you stand a much better chance of success.

Do your preparation, understand your reason for doing outbound calling, establish what end result you're aiming for.

If it's straight sales, how many do you need to make it successful (and financially viable) if it's appointments, what's the closing rate of the people attending the appointments because that will dictate how many you need at the front end to establish a viable operation.

If your outbound calling for collections or similar, what's your process and what does success look like for you?

Outbound calling can suffer from a bad reputation at the best of times so the more professional you act the quicker you will be able to overcome their fears – and the better your success rate.

Plan what you're going to do, prepare properly for it and make sure you and your team know what the aim is and how you intend to get there.

Do your research and know why you're calling – I'm sure we can all agree there's nothing worse than getting a call from someone asking for "The Proprietor" or something similar, it just screams cold call and immediately puts people on the defensive. Which all of a sudden makes your job so much more difficult.

The other difficulty you have with such a generic approach is if you don't know why you're calling how will you know when you've achieved your aim?

With so much social media at our finger tips, gone are the days when you had excuses. It's relatively easy to find out who someone is – just take a scan over Linkedin, twitter etc.

It's about making a professional approach to a professional business person. You have to remember, if you're making outbound sales calls then you are not the only one. I'm sorry to burst your bubble but it's true, any business will get several calls a week, if not a day!! With people offering them everything from water coolers to business rates and everything in between.

What you need to do is prepare properly for the call, know who you're calling and what you want to achieve from the call.

Let's just clarify that for a moment. If you're making a full blown, first contact sales call then you may not get the prospects money straight off the bat. So why not aim for an agreement to call back (or something similar) it's still a win, you've also started a relationship with your prospect which is far more likely to get you the result you're looking for.

If you're aim is collections or similar then first call resolution could be your aim. Appointment setting is an obvious aim if that's what you're tasked to do, but you could also use the 'agreed callback' aim to bring you further to your goal

Always measure what you do…and act on it – KPI's (Key Performance Indicators) or targets are basically there to help you measure your teams performance, but you have to know how to read them, what they mean and how to act on the results.

They allow you to keep track of the performance of your team and the individuals in it. Keeping them up to date is massively important, there's no point in having them if you don't firstly, keep them up to date and secondly, act on them.

And of course, use the results to plan for the future.

For example, if you have one or two people in the team not performing at the same level as the rest, it could mean a couple of things.

- An agent who is making a lot of sales but has a high cancellation rate, it's likely that they are 'bending the truth' when selling (not good for you or your customers)
- They could be being lazy and not working at the same level as the rest
- They're spending too much time talking to people – not necessarily a bad thing, you'd need to check your KPI's to clarify.
- Or it could be that they're struggling with their product knowledge or the delivery of the pitch.

In summary, measure what you do, know how to interrupt the results and act on them. All these points will allow you to understand the teams ability and utilise that knowledge.

Tenacity wins the day…the next call could be the yes – as I already mentioned, it's hard work, you have to be prepared to keep going even if you keep getting 'No's', remember every no brings you closer to a yes!

I've been involved in several discussions over the years as to whether outbound calling (especially in the sales function) is "just a numbers game" or if there's a more scientific approach. My own thoughts are that it's more likely a mixture of the two. Yes you have to be prepared to make lots of calls (again, especially with sales) but if you plan properly and utilise the right skill set then your chances of success will increase.

This is where you motivation skills are tested the most, keep behind your team and reward them when the do well.

Giving agents a beneficial and rewarding incentive scheme will always pay dividends – we all like to get presents for a job well done, even a simple pat on the back, and when we do we work harder!

As a basic rule of thumb you'll get the best results when you make it obtainable. If the team to not feel that the incentive you've set is obtainable – otherwise they are likely to switch of their enthusiasm and that defeats the whole point of an incentive.

Sales people by their very nature generally want to be the best and win the prize, it's why they're in the job. You can of course, use this to your advantage when setting up your incentive program.

When you set it, try and appeal to the majority, it will give you a far better effect if everyone wants to win.

Find out what your team likes and use that for the incentive (within reason obviously) but make sure you don't make it too easy for them!
For the best results you should use short, mid and long term programs. The long term programs tend to be more often referred to as bonus schemes, the commissions the team will earn. Mid term programs can be weekly or monthly, and can be really beneficial if you know that it may be a slow month (holiday season or similar) and the short term would be the daily or on the spot prize type of incentive.

I have personally have fantastic success with on the spot incentives (at very little cost) along with the mid/long term programs. Taking the time to organise them properly with have a massive effect on the team, their results and of course the businesses bottom line.

Remember, on the phone it's more about how you say something rather than what you say – your tone of voice, the pace of your voice and how you generally sound will have a big impact on how you are received by the person you are calling.

Your voice is the tool of your trade and first impressions count. As I mentioned earlier, you are likely to be one of the many calls they receive so be polite, cheery and professional and stand out from the rest.

Communicate with your prospect/customer, don't fall into the habit of talking at them and just delivering your pitch. I remember one agent I saw who fell in this trap, he delivered a fabulous pitch but he was so intent in doing so that he gain no involvement with the customer and didn't notice that they had hung up the phone way before he'd finished his pitch.

Understand the customers needs, wants and desires…and try your best to meet them

I appreciate that we're talking about communicating on the telephone but body language will make a difference to how you sound – if you slouch in your chair it may affect how you come across on the phone. Be clear and concise.

Consider the pitch, pace and tone of your voice. Find the right level of volume and energy, you need to sound enthusiastic and passionate but not too much. Articulate your speech, as I mentioned, be clear and concise, find the right level and above all, listen to what your customer says.

Remember what I said – On the phone it's all about what you say and how you say it.

Know your 'cost per seat' and what it means in terms of sales – it's as simple as this, let's say your agent costs you £100 for him or her to come to work, every sale they make you get £25, so for you to be able to pay them, they must make 4 sales.

Now of course, sale values will differ for every business but the principals remain the same.

There is, as you'd expect, a value that can be placed on the setting of an appointment, with collections it will again be slightly different but it boils down to the same thing.

Each agent will have to perform at a certain level in order for the business to obtain an amount of revenue equal to their costs. Of course the ideal scenario is that the agent performs above and beyond that and therefore creating profit.

Pick your moment – the time that you have to call your customers/prospects is limited to the working day, so you need to make sure that you make the best of it. You need to make sure that your team are “on the phone” at times that will give them the best connectivity and therefore the ability to talk to as many customers as possible on any given day.

Whether you are calling B2B or B2C the same attitude applies.

With B2B there will be times of the day when connectivity is likely to be lower – Monday mornings and Friday afternoons for example – so why not use these times for other things, a Monday morning sales/motivation/incentive meeting or Friday afternoon for admin etc. Give your team the same lunch break as the people they’re calling etc.

When it comes to B2C the same idea works you just change it to fit. Generally a B2C team would start around lunchtime and call till early evening. Unfortunately they have to contend with the school run, meal times and such like. Again the overall aim is to have your guys on the phone at the best possible times, so give them a break at school run time, fit their training in at a time when call connections are lower.

It’s not an infallible approach, nothing is, but if you use your KPI’s etc you should be able to organise the day to get the best call hours and connections.

Never underestimate the importance of ongoing coaching – I see too many managers who just leave their guys to get on with it after their induction. To get the best results you have to keep on top of their performance and that means ongoing coaching, sit next to them and listen to what they’re saying and make constructive observations.

With and size team coaching should play an important part if you want it to succeed.
All of worlds the most successful teams, athletes and business people have got where they are by utilising the skills of a coach so doesn’t it make sense that if you want your sales or customer service team to perform at their best then you need someone to help them achieve it?

To summarise, coaching is about helping someone perform a skill or solve a problem better that they would normally be able to. It’s about helping people to perform better than they currently do, to develop their skills over a period of time. You encourage, you share knowledge and you adopt an open style to allow others to learn from you.

Coaching should be used across the board so that all team members benefit from it whether they are new starters, experienced or just those that want to develop.

Of course, a good coach can also coach those more senior than them…assuming that they want to learn!
The benefits are different for an individual compared to those of a team.
For example a person coached on a 1-2-1 basis will be able to learn at their own pace, have more involvement in the process and will not have to worry or be embarrassed about saying or asking the wrong thing.
Coaching a team as a whole will allow them to become clear about the goals it has to achieve, it can focus them all in the right direction and will generally raise the skill level of all involved.
There is of course, a gain for the coach as well if they do it properly. A good coach will develop closer relationships, they will discover new ways of helping people by listening to the feedback they get and by seeing the people they coach grow.
At let’s not forget the gain for the business.
Improving the ability and performance of your people will add value to your bottom line.
There is a time and place for coaching, what I mean is that there are times when you shouldn’t coach but rather wait until afterwards and then coach.

For example, if the team are up against a deadline. You should help where you can but leave the coaching stuff till calm has landed and you can discuss with the team to prepare them for next time.

We can, as you'd expect, expand on this by asking "Will coaching always work?"

99% of the time I would give a resounding yes, the other 1% is when human nature kicks in and either the environment or the person/persons being coached affect the progress. You can't force someone to learn and you shouldn't try.
We have to remember as well that being the top performer doesn't mean you'll make the best coach, in fact it's very often detrimental to successful coaching.
What you need is the ability and desire to help others improve. Being able to empower people to want to be better is also a massive plus to a good coach.
In simple terms a coach should assess the current level of ability, set the outcomes for learning, agree the tactics and initiate the action to be taken and then give constructive and useful feedback so that the recipient can make sense of what's been learnt.

Training…Training…Training - Good quality, relevant training is massively important to keep people focussed and at their best – it works in the same way that coaching does, keep them up to date and motivated and things will be a lot easier.

Firstly you can't just decide that you want to do some training because you think the team needs to improve.

For one thing a lack of training may not be your only problem!!

The best thing to do is to conduct a training needs analysis so that you can establish where the gaps in performance are and therefore deliver the right training. All sounds very simple I know but there's a couple of things you'll need to consider.

A training needs analysis is used to identify the new skills, knowledge and in some instances, attitudes that your people require to meet yours and their development needs.

So, how to progress, well you'll need to identify the key priorities any new performance goals and eliminate any obstacles that may restrict your obtaining those goals.

You should look for any gaps in peoples competence and establish some success indicators. You should also evaluate the training at every stage.

You need to understand the areas you're going to look at in your analysis and approach each one in turn so that your analysis will give you the answers you need in order to create your training program.

As we can see from everything I've gone through over the last couple of pages, there's an awful lot more to a successful outbound calling function than just sticking a few bodies on the phone and crossing your fingers. Taking everything into account and approaching it with a professional mentality makes a huge difference to the outcome and of course, your bottom line.

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