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How to Handle Your First Call

A Practical Guide to Successful Cold Calling

Getting Started

For many salespeople, cold calling is intimidating. But it doesn't have to be.

The first call isn't about making a hard sell. **It's about establishing a connection, understanding needs, and determining whether there's even potential to move forward.**

Successful cold calling isn't a talent; it's a skill anyone can learn. And like any skill, it comes with proven principles, structures, and tricks to help you achieve better results more easily.

In this e-book, we'll guide you through the entire calling process—from preparation to handling objections—and provide you with a simple roadmap to ensure you're ready for every situation.

With just a little practice, **you'll never be caught off guard by a call again**.

Let's dive in!

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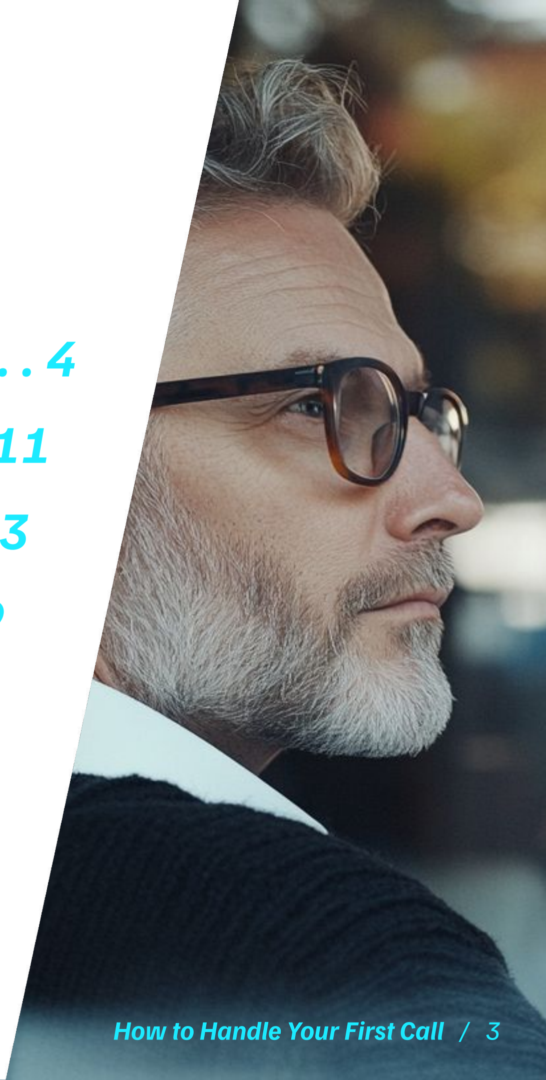

Pre-Call Preparation

The Key to Success

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A successful call starts long before you dial the first number.

Proper preparation helps you feel confident, sound professional, and genuinely connect with your prospect.

So what should you do *before* you even pick up the phone?

1 → **2** → **3**

1. ***Conduct Smart Research***
2. ***Prepare a Script That Doesn't Sound Scripted***
3. ***Set a Clear Objective for Your Call***

1 Conduct Smart Research

Before calling, gather as much information as possible about the company and the person you'll be speaking to. **What do they do? What projects are they working on? Is the company growing, or are they stable? How long have they been in business?**

→ **Tip**: For a quick, effective overview, you can use our tool, **Merk**, which gives you details about the company's turnover, number of employees, industry, leadership, and current economic conditions within a few clicks.

→ And if you don't want to spend much time researching, let **MerkAI** do the work. It'll compile all essential information for you in just 30 seconds.

2 Prepare a Script That Doesn't Sound Scripted

Having an outline in mind is crucial, but **reading from a paper will not sound natural.**

→ **Tip**: Write down bullet points—such as a brief introduction, key questions for the client, and the main value proposition you want to communicate. Let the rest flow naturally based on the conversation.

3 *Set a Clear Objective for Your Call*

Without a clear goal, a call can easily turn **into casual chit-chat without tangible outcomes.**

Define your goal before each call:

- → Schedule an in-person or online meeting
- → Discover whether the company faces an issue you can help solve
- → Identify the decision-making process and the right contact person

Remember: Even a small step forward is a success, and you'll improve with every call.

Summary

- Do basic research on the company and the person.
- Prepare key talking points, not a full script.
- Set a clear objective for the call.

Practical Tip

Before making the call, visualize the tone and style your contact will prefer.

When speaking with a smaller company, keep it more **relaxed.**
When calling to a larger corporation, stick to a more **formal style.**

Adjusting your communication increases your chances of success.

Call Roadmap

A Practical Guide to the Entire Call

Before You Call

- Identify the **decision-maker** (e.g. CEO, Director—someone who has authority)
- If you're using **Merk**, you'll find this information under the ***Employees*** tab.

What's Next?

A Practical Guide to the Entire Call

1 *Spark Interest from the Start*

- Don’t jump straight into the call details.
- Make sure you’re speaking with the **decision-maker.**
- Quickly capture their attention and explain why you’re calling.

2a Decision-Maker on the Line

- → Introduce yourself and politely ask for a moment of their time.
- → Explain **the purpose of your call** and **why** it might benefit them.
- → Address common pain points and ease any potential concerns.

"Glad I caught you. This is _____ from Saleskit, and I'm calling because _____."

"Of course, I don't know exactly how you're handling this today, but I thought it might be worth checking if we could help as well. Do you have 2–3 minutes to find out?"

2b Decision-Maker not Available

- → Try to get the **direct contact for the decision-maker**. Don't discuss details with anyone else.

"Ah, I see. No worries—where could I reach them? Do you know which number I should call?"

- → If they won't share the contact:

"Sure, I understand. And when would be the best time to reach them on this number?"

3a Answer YES

Qualify and Identify Needs

- Ask strategic questions to uncover their needs.
- Use the **FAB method**: Feature (what it is), Advantage (what it provides), Benefit (how it helps them).

“Thanks! So let’s jump right in. How are you currently handling _____?”

“Have you tried _____ before?”

“What was that experience like? Were you satisfied? What results did you see? What was missing?”

“Have you had any experience with _____? What were the pros and cons?”

3b Answer NO

Handle Objections

- Respect their response, but a**im to schedule a follow-up**.
- If they’re not interested, try to understand why—they might simply need more clarity.

“I understand, it’s not the right time. When would be a better time to call back? It really just takes 5 minutes.”

If YES ➔ suggest a follow-up call soon.

If NO ➔ *“That’s totally fine. May I just ask, was there anything specific that put you off?”*

4 Wrap-Up

Set the Meeting

- Naturally transition into scheduling a meeting.
- Prevent the “just send me an email” objection by suggesting a specific time.
- Summarize and confirm you're aligned.

“As we’re talking, it makes the most sense to meet and tailor everything specifically to you. I have two options—next week or the end of the month. Which one would suit you better?”

How to Spark Interest & Lead the Conversation

1 The Opening

The First 10 Seconds Matter

Your first few sentences decide whether the other person lets you continue.

Don’t sound like a robot.

Smile—yes, even over the phone. People can hear it. Introduce yourself **briefly and with energy**.

How to Spark Interest & Lead the Conversation

2 Set the Topic

Why You're Calling, What You Offer

Right at the start, clearly explain why you're calling. This sparks curiosity and lowers resistance. Avoid lengthy explanations, stick to the value.

We recommend preparing your own **elevator pitch**—a short and compelling intro about you and your company designed to pique the other person's interest and make them want to know more. A good elevator pitch helps you land that meeting.

Example: *"With our data-driven B2B solutions, we help salespeople close more deals, sales managers to target more accurately, and companies grow."*

Call Roadmap

How to Spark Interest & Lead the Conversation

3 Ask Questions

Guide the Call with Open-Ended Questions

Let the client do the talking.

Open-ended questions like *“How are you currently handling...?”* are far better than closed ones like *“Are you handling...?”* They will give you more context and help identify real needs.

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How to Spark Interest & Lead the Conversation

4 Manage Emotions

Positive Energy vs. Stress

Sometimes you'll catch someone at a bad time.

Stay calm, keep a positive tone, and show empathy.

This helps ease the tension and increases the chance they'll stay on the call.

How to Spark Interest & Lead the Conversation

5 *Watch for Signals to Move Forward*

Look out for positive signs—interest, questions, or agreement.

That's the perfect moment to schedule a meeting, send an offer, or suggest the next step.

TIPS: What to do when the prospect...

is surprised → Slow down, be kind, give them time to breathe.

is skeptical → Ask something like "What would be the key factor for you in this area?" and let them open up.

is rejecting → Thank them and ask if you could reach out another time or if there's a colleague who handles this topic.

Principles
of an Effective call

A well-run call is one where the client is doing most of the talking.

And the more they talk, the more insights they reveal.

A successful sales call isn't a monologue. It's a **structured dialogue**, where you guide the direction but make space for the other side to engage and open up.

1 → 2 → 3 → 4

1 *Talk Less, Ask More*

2 *Practice Active Listening*

3 *Summarize What You Hear*

4 *Gently Take the Lead*

1 80/20 Rule: Talk Less, Ask More

Your goal isn't to deliver a rehearsed pitch, **it's to find out how you can actually help.**

Ideally, the client should be talking 80% of the time.

Your role is to guide the conversation with questions, occasionally summarize or clarify, and take notes along the way—those will come in handy later.

2 *Practice Active Listening*

When you truly listen, you not only sound more professional but also **uncover valuable information.**

Active listening means showing you're engaged: use phrases like *"I see,"* *"That sounds like a challenge,"* or paraphrase what you've heard.

3 Summarize What You Hear

After each key part of the conversation, **make sure you're aligned.**

"So if I understand correctly, you're looking to speed up lead generation and get a better view of lead quality, is that right?"

Summaries show you're listening and help confirm you're on the same page.

4 Gently Take the Lead

Every call needs a guide—and that's **you.**

Don't let the conversation drift into dead ends or unnecessary detail. When you feel it's time to move forward, do it naturally:

"Thanks, that gives me a clear picture. Let's now take a look at how we could actually help."

Common Cold Calling Mistakes

Even experienced salespeople can make mistakes in cold calling that reduce their success rate.

The good news? Most mistakes are easy to avoid, if you know what to watch out for.

Selling Too Soon

The first call is not a sales pitch, it's the start of a relationship. If you push too hard, too fast, you risk turning the client away. **Your goal is to open the door, not close the deal.**

Talking Too Much

Long explanations without room for a response just don't work. **A good call is a conversation.** Ask questions, listen, and respond.

Ignoring Objections

Pretending objections didn't happen builds distrust. **Acknowledging and unpacking objections** shows professionalism and empathy.

Unprepared for Questions

"What exactly are you offering?" or "*Why should I talk to you?"*—these are the questions that will come up. **Be ready with a clear, confident, and concise answer.**

Handling Objections Stress-Free

Objections aren’t the end of the call— they’re part of it.

They mean the person is **thinking and interested.**

The key is to treat them as invitations to a deeper conversation, not as a rejection.

1 Why Do Objections Happen?

Objections aren't personal. Most often, they signal:

- → **Lack of information** (*"I need to think about it"* = I don't fully understand it)
- → **Fear of change** (*"We're already using something"* = I'm afraid to change)
- → **Bad timing** (*"Now's not a good time"* = Maybe later)

2 Accept and Explore

Don’t rush to argue. First, acknowledge and validate:

“That makes sense. Changing partners is never easy…”

Then explore:

“Can I ask what would need to be different for you to consider it?”

3 *Respond That Builds Trust*

Respectful responses show confidence and professionalism.

And if you can propose a solution—like **highlighting a benefit** or **offering a free trial**—you increase the chance of moving forward.

Special Add-On: Objection Handbook

Have an objection handbook ready.

A simple document with typical objections, their causes, and recommended responses.

It will **boost your confidence**, especially in tricky situations.

Special Add-On: Objection Handbook

Objection	***What the Client Really Means***	***How I Could Have Prevented It***	***Acceptance and Exploration***	***Possible Solution***
"We don't have the budget right now."	Fear of unnecessary spending	Better timing + added value	I understand – let's talk about your future plans.	Propose a plan for later
"We already have a provider."	Fear of changing something that works	Understanding the current solution	Great, I'd love to ask – what's working well for you today?	Show the added value

Download Your Handbook Here

Next Steps & Follow-Up

The call isn't the end of the process, it's often just the beginning.

Success often lies in **what you do *after* the call.**

1 Clearly Define the Next Step

A meeting, sending a proposal, intro to a colleague... **Never hang up without a clear agreemen**t on what happens next.

If it’s not the right time to collaborate yet, schedule a follow-up call—ideally with a specific reason.

2 Send a Follow-Up Email

Briefly summarize what you discussed and confirm the agreed next steps.

Ideally, include something extra—share a relevant article, a case study, or a product sample.

3 Follow Up with a Valid Reason

Use a calendar, CRM, or another system to follow up at the right time.

The key is a relevance—don't just say *"Just checking in."* Give them a reason.

Tip

If you're using our tool Leady, you can track whether the client visited your website after the call.

And time your follow-up accordingly.

You can even **import company IDs** you contacted and set up notifications in case any of them visit your website.

Conclusion

Cold calling doesn't have to be stressful when you know who and why you're calling, and what to expect.

With the right structure and preparation, cold calling becomes **a powerful tool for winning new clients.**

The first call isn't about closing the deal. It's about making contact, uncovering needs, and opening the door to future conversations. With a clear plan, solid prep, and a bit of practice, anyone can learn to make calls that work.

Good luck, may your next call be your best one yet!

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You’ve Reached the Finish Line.

Try our tools for free!

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