



Telephone Sales Skills Database

Observations						
		POSITIVE Result	IMPROVEMENT Result			
Item	Description	Praise	Development Action	Development Action Plan	Outcomes	Achieve Resources
1	Organization Skills	ISR has efficient organizational skills.	Organize your work area to maximize productivity.	Documents and resources must be available to answer questions posed by customers or the sales process. No one can remember everything in his or her head; documents provide great information sources.	By having an organized work area, you will have answers at your fingertips, leading to more sales.	
2	Attitude Toward the Organization	ISR has a positive attitude toward the company and its products and services.	Make sure you show a positive attitude to your customers.	Customers look to you for their clues on the values of our products and services. A positive attitude reinforces the value we provide. Customers also look to you to reassure them about risk. Your positive attitude reduces their anxiety.	When you express a positive attitude, your customers will more highly value your products and services, and perceive reduced risk, raising sales.	
3	Sales Strategies	ISR has an effective sales strategy impacting customers, prospects and suspects.	Develop strategies for each category: customers, prospects and suspects.	A developed, well-balanced territory involves strategies and tactics to maximize customers, prospects and suspects and their contributions to sales. You need to develop new customers over time. Attrition in business-to-business is a fact of life. Think of the farmer; plant seeds to enjoy the harvest later on.	A well-balanced territory performs better over time, leading to a stable, high run-rate of revenue.	Business Performance Group Online: <i>Territory Planning for Inside Sales Representatives</i>
4	Solutions – Advantages – Benefits – Questions	ISR pre-qualifies benefits by asking good questions and generates interest and excitement.	Use good questioning to uncover product solutions as benefits to the customer.	Solutions are attributes of our product or services. To find out if they are benefits, we must ask the customer good questions. Then we can present the benefit by saying “you said” – immediately generating interest and enthusiasm for our offerings.	By using solutions – advantages – benefits and questions you will generate more excitement, and focus the sales conversation on what most interests the customer – increasing sales.	Business Performance Group Online: <i>Value Proposition for Inside Sales Representatives</i>

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5	Reference Stories	ISR uses reference stories to generate excitement and offer proof our products and services solve customer business issues.	Use reference stories to provide proof and generate excitement.	Reference stories are powerful analogies that peak customer interest and provide a measure of proof mere statements from the salesperson cannot match. Remember, 35% of the human brain is dedicated to visual images. Plant exciting and memorable images for your customers using stories – stories that refer to your products and services and the value they provide to your customers.	When you use reference stories, you will create great visual images that will result in more confident customers and higher sales.	Business Performance Group Online: <i>Outbound Telephone Selling for Inside Sales Representatives</i>
6	Allocate Time Between Customers – Prospects – Suspects	ISR allocates his or her time effectively between all customer segments.	Allocate time effectively between customers, prospects and customers.	Attrition is a fact of life in business-to-business selling. Ownership changes, your contacts change and business environments change. You must always be developing new accounts to replace the inevitable fall-off in your customer base.	When you create a balanced territory, your sales run-rate will be more stable, predictable and valuable.	Business Performance Group Online: <i>Time Management for Inside Sales Representatives</i>
7	Opening the Call	ISR opens calls effectively using a compelling reason to call.	Use a compelling reason to call to open each sales call.	When you use a good compelling reason to call to open a call, the customer will be engaged and interested. What is compelling for the customer to listen? Ask yourself this question, and then craft a call opening around the answer. Remember, it is all about them – all about the customers.	When you open with a good compelling reason to call, the customer will be engaged and interested, leading to higher sales.	Business Performance Group Online: <i>Outbound Telephone Selling for Inside Sales Representatives</i>
8	General Probing Skills	ISR asks good probing questions, closed- and open-ended, establishing sales dialogue.	Ask one more probing question per call.	Before each call, have in mind a new open-ended question to ask the customer about his or her business needs. This question should be of the “tell me” or “describe to me” type designed to find out more about the business to help guide the sales cycle. Ask one more question.	By asking one more question during each conversation, you will learn more about the customer and can refine the sales process for the potential sale.	Business Performance Group Online: <i>Opportunity Generation for Inside Sales Representatives</i>
9	Probing for Budget	ISR asks about budget, facilitating the recommendation of the appropriate product or service.	Ask about the customer’s budget for solving the business issue when appropriate.	Your time and the time of your customer are valuable. By probing for the budget to solve the business issue at hand, you are able to properly tailor your offering to the client's needs.	When you align your proposed solution to the customer's budget, you achieve a better match, leading to greater sales.	Business Performance Group Online: <i>Opportunity Generation for Inside Sales Representatives</i>

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10	Probing for Buying Committee	ISR probes for the buying committee and finds out all of the individuals affected by the business issue.	Ask about the buying committee to identify all the potential decision makers – formal or informal.	Many individuals may have an impact on your ability to sell a particular solution. By probing for buying committee, you have a much better chance to address the needs, timelines and risks of everyone who will have input into the choice of your solution. Your job is to sell to everyone who has a voice in the decision-making process.	When you identify the buying committee, you will identify all of the risks, needs and timelines, leading to higher sales.	Business Performance Group Online: <i>Opportunity Generation for Inside Sales Representatives</i>
11	Probing for Risk	ISR asks great risk-based questions and removes uncertainty and the impact on the business.	When a buyer shows concern about risk – by delaying a decision – continue to remove uncertainty by engaging the customer in “If you decide to move forward, will this date work for you?” or similar language.	Our biggest competitor is often “do nothing” – that big, ugly ogre who hides under every opportunity. Often times “do nothing” happens because the customer faced a risk he or she could not get over. What happens if the solution is poor? What happens if people don't like it? What happens if this doesn't address my needs? Risk is caused by uncertainty – removing uncertainty anyplace in the process lessens risk and increases the chance of moving forward – select a date, an approach, etc., and it helps raise the comfort level of the buyer.	By reducing uncertainty, you'll reduce risk, thereby closing more sales.	Business Performance Group Online: <i>Opportunity Generation for Inside Sales Representatives</i>
12	Probing for Needs	ISR does a good job of probing for general needs to align our products and services as solutions.	Probe for the general needs of the buyer – not only those connected with specific product or service attributes.	Besides generating excitement with specific benefits, also ask the buyer about the general needs of the organization. What else do you need to know to position your products or services correctly? For example, is the number of employees important? Is how they conduct their business? The equipment they own? Determine what you need to know to do an effective job of diagnosing and prescribing.	By probing for general needs, you will properly align our products and services with the customer's requirements leading, to higher sales.	Business Performance Group Online: <i>Opportunity Generation for Inside Sales Representatives</i>
13	Probing for Timeline	ISR probes for timeline effectively and uses the information to guide and manage the sales process.	Probe for timeline. Use the information to manage the sales cycle and plan the investment of your time.	Timeline is important in business-to-business. When does the buyer see solving the business issue? Sometimes the need is immediate – at other times it is long term. By probing for timeline, you will be able to manage the sales process and your time effectively.	When you probe for timeline, you will manage both your time and the buyer's. This will lead to more efficiency and higher sales.	Business Performance Group Online: <i>Opportunity Generation for Inside Sales Representatives</i>

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14	Call Conclusion	ISR establishes good "next steps" on each call – these steps advance the sales process.	On each call, make sure you establish the "next steps" of the sales process.	When you establish "next steps" at the end of each sales call, you can open your next call with "you said" or "you asked me to" or similar language. This makes the call about the buyer, not about you. Your job as a salesperson is to manage the sales cycle. Establish next steps – do your homework – and use the "you said" as your next compelling reason to call.	By determining next steps, you will advance the sales cycle which leads to the money call – where you ask for the sale.	Business Performance Group Online: <i>Outbound Telephone Selling for Inside Sales Representatives</i>
15	Gatekeepers	ISR establishes good rapport with gatekeepers and asks for their help.	Establish good rapport with gatekeepers and ask for their help.	Gatekeepers hold the keys to the kingdom in many organizations. They also know the answers to many of your questions. Treat gatekeepers with respect and ask for their help. Their job is to help their organizations – the same as your role.	By developing relationships with gatekeepers, you will learn valuable information and gain a key ally in the account, leading to higher sales.	Business Performance Group Online: <i>Outbound Telephone Selling for Inside Sales Representatives</i>
16	Cross-selling and Up-selling	ISR cross- and up-sells effectively and provides the customer with the best solution to his or her needs.	Make sure the buyer is considering the appropriate products and services for their situation.	Cross- and up-selling are used to make sure the buyer is considering all of the auxiliary items required and the appropriate level of product or service. By asking good transition questions, and then presenting pre-qualified solutions, you will ensure the buyer is getting what is needed to address the business issue.	When you cross- and up-sell effectively, buyers will purchase the best solution to their needs, leading to satisfied customers and higher sales.	Business Performance Group Online: <i>Cross-Selling and Up-Selling for Inside Sales Representatives</i>
17	Presenting Product or Service	ISR has good presentation techniques and a conversational approach.	Use a conversational approach to your presentations. Use "you said" to present benefits and use short statements that engage the buyer.	Pre-qualifying solutions as important to the customer allows you to present them conversationally by using "you said," "you mentioned" or "you told me." Break your presentation into 35-second segments and then re-engage the buyer with a trial close or another question.	By using a conversational approach to your presentations, you will keep the buyer engaged, interested and listening – this will result in better sales performance.	Business Performance Group Online: <i>Sales Opportunity Management for Inside Sales Representatives</i>

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18	Overcoming Objections	ISR overcomes objections by acknowledging, clarifying and responding and then transitioning back to the sales process.	Overcome objections by using the ACT method – acknowledge, clarify and respond, and then transition back to the sales process.	When overcoming objections, use a three-step ACT method – acknowledge, clarify and respond, and transition back to the sales process. Acknowledge by stating you “understand” the buyer – don’t reinforce. Clarify and respond by asking additional questions and using benefit statements. Transition back to the sales process by using a trial close – “Have I answered your question?” – “How does this sound to you?”	When you overcome objections using the ACT method, you will address customer concerns, answer questions and position your products and services with the best chance of success, leading to higher sales.	Business Performance Group Online: <i>Handling Objections for Inside Sales Representatives</i>
19	Closing Effectively	ISR closes effectively by sensing the buyer’s readiness to close, summarizing effectively and offering a concrete business proposal.	Close by paying attention to buying signs, summarize and then offer a concrete business proposal – what you are asking the buyer to purchase.	When buyers are ready to close, they typically change their behavior or ask to go over the proposal one last time. When you close, summarize the top benefits for the customer and then offer a concrete business proposal – what you are asking the buyer to buy. This business proposal should contain the product or service, the timeline for delivery and the investment required.	By closing effectively, you will ask for the sale more productively, increasing your sales.	Business Performance Group Online: <i>Closing for Inside Sales Representatives</i>
20	Trial Close	ISR uses good trial closes to “take the buyer’s temperature” and to uncover any objections the buyer may have.	Use trial close questions to “take the buyer’s temperature” and uncover any objections.	A good trial close is used to get the buyer’s point of view. Does the buyer have objections you need to overcome? How does the buyer feel about your solution? Your product or service? A trial close is used to “take the buyer’s temperature.” It is not a definitive statement like the close, but rather a way to stimulate dialogue and understanding.	When you use a good trial close, you will handle objections earlier and understand the buyer’s opinion of your solution prior to asking for the sale. This will increase your chances of sales success.	Business Performance Group Online: <i>Closing for Inside Sales Representatives</i>
21	Closing Statements	ISR uses good closing statements – statements that when answered leave no doubt the sales is complete.	Ask for the sale. Use definitive closing statements that leave no doubt of the buyer’s intentions.	When we have successfully traversed the sales cycle and accomplished all of the steps articulated by the buyer, it is time to ask for the sale. The buyer will expect us to ask for the business, and it’s your job as a salesperson to ask a question to which your buyer can respond “yes.” Make sure you ask for the sale.	When you ask for the sale, you will get more orders and the satisfaction from successfully completing the sales process. This will grow your revenue dramatically.	Business Performance Group Online: <i>Closing for Inside Sales Representatives</i>

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22	Customer Advocate	ISR takes the viewpoint of the customer and becomes the customer's advocate to solve the business issues.	Pull instead of push. Be on the side of the customer "looking at us," not the other way around.	If we take the customer's viewpoint, we often get permission to present multiple offerings, not just the first product or service considered. If we are working with a customer who does not like our initial offer, we can comfortably suggest other items for the customer to consider, if we keep referring to the customer's issue, not our products or services. It's all about language – and how you position yourself to the customer. Remember, you are in a boundary position – one leg in the customer's business and one leg in your company's – help the customer find the best solution from his or her point of view.	By taking the customer's viewpoint, you'll align yourself with buyers and make more sales.	Business Performance Group Online: <i>Customer Care for Inside Sales Representatives</i>
23	Opening the Call – In the sales process	ISR reminds the buyer of his or her business issue, making the call about solving the issue, not the ISR's products or services.	When you open the call, remind the buyer how you got started – what business issue caused the two of you to begin a sales cycle.	The salesperson is responsible for advancing the sales process. Buyers will be relieved and impressed when you take responsibility to manage the buying process, take care of the details and make recommendations. Keep the "buying ball" with the buyer and the "sales cycle ball" for yourself. It's all about the buyer – make sure he or she remembers why you got started in the first place. You are not a problem – "Why is this salesperson calling me again?" You are a solution – "He's/She's here to help me solve my problem."	When you look at the business issue – not the product or service – you have a better chance of closing.	Business Performance Group Online: <i>Outbound Telephone Selling for Inside Sales Representatives</i>
24	Time Management	ISR manages his or her time effectively by batching calls and organizing the sales day.	Use effective time management techniques.	Most salespeople are at their peak effectiveness when they batch similar work. Typically, jumping from task to task takes longer than doing like items at the same time. Set apart time to make your phone calls so that you can get in a rhythm and focus on the customer. Because our products and services have a sales cycle, we need to invest time and energy today to reap rewards tomorrow. Because the reward is not immediate, it's difficult to put off those things that look more urgent.	The most valuable resource a salesperson has is his or time. Talking to one additional decision maker every day can result in 200 more conversations a year, producing more sales.	Business Performance Group Online: <i>Time Management for Inside Sales Representatives</i>

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25	Tone of Voice	ISR uses a great tone of voice, which engages the customer and enhances phone calls.	Use tone of voice to let the customer know you are interested and engaged.	Experts say in face-to-face meetings, 38% of the message is communicated by tone of voice, 55% by body language and 7% by word choice. Over the telephone, we do not have body language at our disposal, meaning tone of voice and word choice is critical. Telephony equipment reduces the nuances of tone of voice. Because of this, we need to make sure we use tone of voice as positively and effectively as possible. Your tone of voice should indicate a keen interest in the customer. Your mantra should be "it's all about them." Use phrases such as "tell me more" and "describe that to me" to open up the call.	By using a great tone of voice, you'll communicate your interest to customers and get them engaged. Your engaged customers will buy more from you.	Business Performance Group Online: <i>Communication for Inside Sales Representatives</i>
26	Voicemail	ISR uses voicemail effectively to advance the sales process.	When leaving a voicemail, start with the business issue – it will raise the percentage of voicemail response and indicate to the customer it's "all about you."	When the voicemail is about the customer, not about us, we can bridge the gap between the customer's organization and our company. A salesperson's job is to take the boundary position – with one foot in the customer's camp and one foot in the company's camp. It's all about them – diagnose before you prescribe. By referring to the business issue – what prompted you to get started – you bridge the gap and improve the odds your voicemail will be heard.	By aligning yourself with the buyer, you'll get more responses to voicemail.	Business Performance Group Online: <i>Outbound Telephone Selling for Inside Sales Representatives</i>
27	Product Knowledge	ISR has good product knowledge and uses this knowledge in situations with customers.	Learn about our products and services to act as a resource for our customers.	Your customers look to you as a resource. This doesn't mean you need to know everything about our products or services, but you do need to know where to get answers if customers have questions you cannot comfortably answer. Learn about our products and services and where to go within the organization when you need help.	When you are knowledgeable about our products and services, your customers will see you as a consultant, boosting sales.	Business Performance Group Online: <i>Continuous Learning for Inside Sales Representatives</i>
28	Note Taking	ISR takes good, easy-to-follow notes from telephone calls and the sales process.	Take good notes to document the sales process and to assist other members of your team.	The typical telephone representative has many more accounts than memory can serve. Carefully-taken notes will assist in moving the sales process along and documentation will help other members of your team who need to step in while you are out or busy.	When you keep good notes, you will advance more sales cycles and assist members of your team, improving sales.	Business Performance Group Online: <i>Account Development for Inside Sales Representatives</i>