

Telemarketing Guidelines

1. Plan what to say as an introduction. This is especially important if you get the secretary (gatekeeper).

eg. "I am calling to find out about your plans for XYZ. Could you spare me a couple of minutes to discuss your current or proposed projects in this area?"
2. Check you are speaking to the right person.

eg. "Are you responsible for XYZ projects within your organisation?"
3. Plan what questions you wish to cover and make a note sheet to jot down what they say (a sample is attached). The details can always be entered onto the database at the end of the call – but it is distracting to type and talk at the same time.
4. Ask open questions – who / what / why / when
5. Probe to get more detail – if they don't tell you everything you need to know, keep trying to get the extra information you need.
6. Agree the next action with the contact (and do it!)

eg. send a letter, send an information pack, arrange a date for a meeting, arrange a time to call back – even if it is in 6 months time, make a note to remind you to do it.

Telemarketing Record Sheet

Company Name:		
Contacts		
Name	Job Title	Role / attitude
Timescales		
What timescale do they want		
Is this realistic?		
Budget		
Do they have one?		
If not, how do they get one?		
Who has to approve it?		
Date of approval?		
Competition		
Who else are they looking at?		
Is there an incumbent supplier?		
Current System		
Do they have a system in place now? If so what is it?		
Requirements		
Is there a statement of requirements or specification?		
General Notes		

