

# ***Relationship Sales At Scale***

## Qualification Call Script Sample.

This is a condensed version of effective qualification processes we've observed from a variety of salespeople. As you'll see, while some of the specific questions, as marked in *italics*, are geared toward an ROI-centric offer, 80% of it is transferable to most situations, and you will need to update the specific questions and verbiage to your offer and market.

- I checked out your site and was impressed... (mention something in particular).
- Do you know anything about us?
- Did you have a chance to check out our site / materials?
- Was there anything in particular that interested you?
- By the way, how much time do we have?

[if less than 20 min, reschedule]

### **About us real quick:**

- [Your elevator pitch].

*Example: We are a fractional new business team specializing in agencies and B2B service companies. We help you or your salesperson get meetings with skeptical decision-makers. We do this with a proprietary approach called Relationship Sales At Scale.*

- Don't worry, later I'll go into details and a quick preview of our approach.
- You might leave with more questions than answers on this call, but if we're a good fit, we typically set up a Strategy call next.

- Is it ok if I ask you some tough questions first so I can understand your situation?

## **DISCOVERY QUESTIONS:**

### **Company Profile.**

- I did some research, but would you tell me about your business as it stands now?

- *How would you describe an ideal client?*

*In which verticals are you strongest? Consumer vs. B2B?*

*How big are the companies you're pursuing? Headcount and revenues?*

- Not to put you on the spot, but what makes you different?

### **Team Structure.**

- Can you tell me about your XYZ team? Who does what?

*Learn about the people who would be benefiting from your offering ie. marketing, sales, operations, or whichever group.*

- *How much time do you and your team have to engage with new prospects?*
- How successful have your efforts been when it comes to XYZ?
  - *Outside of word of mouth and referrals, how are you typically winning new clients?*
  - *What channels and tactics have you tried?*
- *If they mention they have worked with an outside company: In working with the other company, how did you make that decision in the past?*

- Have you done what we do, either in-house or out-of-house?

Example: *Have you done targeted outreach before to get meetings with prospects?*

If “Yes”

- When / how recently?
- What did you do exactly?
- How would you describe the experience?
- What were you expecting? What actually happened?

If they were satisfied - go for the no: “So it sounds like it worked, why not just do it again?”

If they were unsatisfied, get them to tell you *exactly* how to win their business.

## **GOALS:**

- If you don't mind me asking, how would your big picture goals when it comes to XYZ over the next 12 months?
  - *Is there a revenue goal you're looking to hit?*
  - *# of Clients?*
  - *How might that break down? A few big clients, several smaller ones...*  
*Is that a big increase for you?*
- Supposing you don't achieve these goals, what's at stake for you and your team?
- **TIME CHECK:** we've hit 15 minutes, how are you on time?

## **Summarize challenges/pain/goals...**

*It sounds like you're going for \$5M next year, and you have some sales support... is that right?*

**Preview - make them want it (See ‘How to Go Hollywood’ in pt. 3).**



Cool - would you like to see some examples of clients we've helped?

## **BUDGET.**

- We're a good fit for those in XYZ situation [contextualize the investment and pre-qualify them].

*Example: We're a good fit for clients pursuing 'big ticket' deal sizes, usually in mid-to-large companies... For context, average lifetime values for the companies our clients are pursuing is \$20k to around \$10M. How does that sound to you?*

- This is an investment that would entail roughly \$X...
- Is that a big number for you?
- If you don't mind me asking, what would need to happen for this to make sense?

*How many clients would you need to win?*

- How would this compare to the overall marketing and sales investments you're making now?

## **TIME FRAME.**

So we can stay ahead of things, how soon are you looking to get help in place?

## **ADVANCE.**

- Would you mind telling me a bit about your decision making process?
- Who is involved? What is their involvement?
- What do we need to do to make sure that they are on the next call?
- Is it ok if we book that call now?
- Great! As I mentioned, on the next call I'll go over a custom strategy, relevant live demos, and more details.