



## **FEEL WARMER ABOUT COLD CALLING**

WRITTEN BY ALEX BLAKE | FEBRUARY 2019

# THE MOST IMPORTANT ELEMENTS OF A GOOD NEW BUSINESS CALL

## Objectives -

Know what you want as first, second and what your fall back objectives are before making a call. Depending on the compatibility and anticipated partnership value this may be meeting with key contact, the opportunity to submit more information about your charity and a follow up call and an invitation to join cultivation event etc.

## Listen to them -

It is easy to assume from research online that you understand what the business wants/needs and how you can help. Often the reality is highly flexible compared to what is outlined on websites. The key to a successful call is to get them talking about their strategy, this gives you the ammo to follow up with 'I'm so glad to hear that, as it happens that we....', and while they are talking, you have time to construct your best approach and pitch that you are the solution.

## Be flexible -

Every call is different. Be adaptive and opportunist based on what you hear. This means using your knowledge and expertise of your charity to engage them on the most appropriate level as the call leads you. But remember your objectives, your aim is always to leave the call with a next step.

It goes without saying, but **be likeable!** you could have the best proposition on the planet, but the old adage people buy from people stands – particularly in corporate fundraising. Remember to actively listen, reflect back, don't interrupt, try smiling when you talk – you can hear it! The more they like you, the more they will do/get done on your behalf.



## GENERAL TIPS AND SUGGESTIONS:

**Coffee is king** - if you can get it in there, those 30 mins (or less) will serve you better than 100 emails and phone calls. 90% of most new business only gets signed and sealed after an in person meeting. The sooner the better and it is a lot easier to both pitch and set expectations in person.

**Make your follow up immediately** - if you have said you'll send some general info about your charity – make space in your diary to send it right away. Make a note of next steps and set diary reminders for chaser calls/emails.

**Be brief and to the point when you speak** - where possible always finish your sentence with an open question or directive question to get them talking again.



## PHASE 1 –

### THE OPENER:

A big part of cold calling for new business is not allowing them to phase out or put the phone down right away. Here are some tricks for good door openers and ways to keep the conversation going:



### EVERYONE LIKES A COMPLIMENT!

Praise their CSR agenda and its clear vision/focus. You were 'deeply impressed when you read this online, which is one of the reasons for your call today. You wanted to touch base as you think there is such alignment in our goals'. Do mention you have looked at their CSR policies/practices where relevant, it matters that you did your research and are calling for a reason.

### YOUR FIRST JOB IS TO GET THEM TALKING

You normally have about 20 seconds to explain who you are, what your charity does and the reason for calling – this is where you flip immediately into 'them' – compliment/question – whatever is most appropriate, you haven't started the hard sell yet. This will get them talking...



## PHASE 2 –

### **BUILDING SYNERGY AND BUSINESS VALUE**

#### **RECOGNISE THEIR HARD WORK/ ACHIEVEMENTS**

You've seen/admired their work for some time: 'xyz campaign was so strong: you were astounded by what they raised for x charity last year; you are genuinely moved by the commitment of the business to local communities etc'

#### **TALK ABOUT THEIR STRATEGY AND THEIR STAFF**

Find out what they are already doing and how does the business support this. You are looking for soft ins and info you can use later in the call to your charity's advantage.

#### **NOW, IF APPROPRIATE YOU START TO PITCH**

Use your charity's strength – what is the link to your cause, for example if you support carers it is that 1 in 6 of their employees will be a carer, or if you're a youth charity it might be issues around skills gaps in young recruits –

#### **Your work is relevant to their business objectives because they need x, y, z.**

You should talk about the impact this has, the lack of support available and what your charity and their company could do together.

#### **USING URGENCY**

This is a tricky one and you need to make a judgment call based on the feel of the call, but undoubtedly, a sense of real urgency about the cause helps drive action/attention within companies (that being said, can't push too hard as you want to align with their budget cycles and ensure that you don't lock yourself into a now or never type situation). A hard-hitting fact about your beneficiaries or cause can be used if urgency is not appropriate.



## PHASE 3 –

### THE CLOSE

#### HOW YOU WORK WITH PARTNERS

Talk about your absolute commitment to strong, mutually beneficial partnerships that really deliver. How proud you are of some of your strategic partners/employee partners (as appropriate). **Name drop one or two**, but not competitors! You are trying to establish yourselves as being easily able to build best in class partnerships.

#### WITH YOUR OBJECTIVES

And having learned more about how closely you feel the business aligns with the work of your charity, propose the most appropriate next steps.

#### GATHER CONTACT DETAILS

Email, telephone (job title if it feels appropriate to ask).

#### THANK FOR THEIR TIME AND INFORMATION, WHAT A PLEASURE IT WAS TO SPEAK AND LEARN MORE ABOUT THE BUSINESS

Reaffirm next steps and actions.





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WHAT WE DO AND WHO WE WORK WITH AT  
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