**Warm Calling   
 THE NCAB WAY OF NEVER EVER COLD CALLING AGAIN**

**Chapter 1: Introduction**

**Lesson 1: Introduction to Warm Calling**

Welcome to the warm calling course. The purpose of this is to share our experience that we've gained over the past few years so that you can improve your success rate when talking to prospect customers.

The reason why I love warm calling is because, for me, it's a roars form of selling. It's just me, the telephone, and the customer. There's no sharps suit, there's no flashy presentations, it's just me listening to the customer, identifying a need and offering a solution. So, after this course, I really hope that you will have picked up a few hints and tips throughout the lessons, you would have gained a bit of success yourself, and ultimately, I really hope at the end of this course you're in the same position as me where you truly believe in warm calling and genuine love the process of it.

The course consists of 12 individual lessons which are broken down into bite-sized chunks that you can use in your own time to develop your knowledge and experience on the warm calling process. So, why was I asked to facilitate this course? It wasn't until I started speaking to colleagues around the rest of the group that I quickly discovered I'm one a few people that actually enjoys warm calling. Now why is this? It made me wonder if I'm different than my colleagues I'm a little bit strange, and I actually believe it's because of 2 reasons.

One, we don't enjoy receiving cold calls at the weekend or in the evening when we're sitting in front of the TV with our favorite dinner trying to get some peace. And then this leads on to the second point where we actually approach warm calling in a very negative way because of our negative experience we've received with cold calling. So, before we focus on exactly what we should do, when and how we should do it, I want just to actually define to you the differences between a cold call, a warm call, and a hot call.

A cold call is trying to sell to an unknown person without knowing if there is a need. Let me assign an example to this. I am a window salesperson, I walk up to a house and see they have 4 brand-new windows recently fitted. I ignore this and I proceed to knock on their door, asking if they want 4 more windows. I know there's no needs, but I pursue it anyway in the hope that I might get lucky. This is a cold call.

A warm call is trying to sell to a validated person having good reason to believe there is a need. So, let's assign this to NCAB. NCAB provide PCBs at the lowest total cost with excellent quality. The customer requires PCBs at the lowest total costs with excellent quality. We've identified a need and we're offering a solution, it's a completely different process than a cold call.

And a hot core is trying to sell to a known person, having excellent reason to believe there is a need right now. So, for example, if a customer approaches us and says they require PCBs, then this is a hot call. We're not going to spend much time on this because these are easy sales, and I'm sure you don't need any more explanations on how to handle these types of inquiries.

Now, we understand the differences between a cold call, a warm call, and a hot call, should we be cold calling potential new customers? The answer is absolutely not. At NCAB, we're gonna focus on warm calling. This is because we don't like receiving cold calls ourselves, so why should we cold call potential new customers?

The benefits of understanding the differences between the 2 is important as it allows us to approach warm calling in a much more positive manner. This is important (which is why it's lesson number one) as it will be directly related to how successful you are on your warm calling journey. Before you move on to lesson number 2, please review the difference between cold versus warm calling and relate it to your daily lives. The next time a colleague or yourself receives a call from an unknown supplier, think to yourself, “Was that a cold call or was that a warm call?” Did they know you had a need for their products or were they just assuming, making a guess, and trying their luck?

Once you understand the differences between the two, you approach a warm call in a very different way. You have an appreciation that that person has validated whether you have a need for their requirement and they've spent some time researching your company.

**Chapter 2: Warm Calling Values**

**Lesson 2: Warm Calling values**

Before we focus on how should warm call, we've devised some warm calling values that you can follow to make the warm calling process that much easier.

The first warm calling value is **focus on the beginning**, not the end. Once you've done a certain level of validation for a potential new customer, it's very easy to get distracted by the very large potential. And what this does is it distracts you from what's important, and that's identifying a need and offering a solution. If you focus on only what's in front of you, you can identify that need much quicker, and this can lead to much higher success rates when following the warm calling process.

The second warm calling value is **be a helper, not a pitcher**. If we cast our minds back to lesson number 1, you'll remember that we are warm calling, not cold calling. So, before we've picked up the phone to a potential new customer, we've already identified a need for our product. So, this means we're not pitching, we're not selling, we're simply identifying a solution for a need the customer has.

The next warm calling value is, **the soft sell is the best sell**. Please remember, we've already identified a need for this customer so this takes the stress out of the situation. It doesn't matter if it happens in 1 week, 10 months or 2 years, we know that there is a good fit for our companies to work together, and this will ultimately lead to stronger relationships.

Last, but not least, the final warm calling value is, **stop chasing prospects, act with dignity**. Now, I'm not sure at what part of my life that I was told this, but it stuck me ever since; desperation doesn't look good on anybody. When we approach these potential new customers, we should act with dignity. Not only does this build confidence with this potential new customer, but it also ensures that we start the relationship on an equal playing field. This means that, should we be successful and we convert this customer, it means that on future negotiations, we are considered an equal. This means that we can command a higher margin, gain larger respect, and ultimately build a stronger partnership between our 2 companies because they believe we can help them just as much as they can help us.

So, before we end this particular lesson, I want to summarize the warm calling values as this is crucial to how we should approach warm calling moving forward.

* Focus on the beginning, not the end.
* Be a helper, not a pitcher.
* The soft sell is the best sell.
* Stop chasing prospects, and act with dignity.

With these values and with the knowledge you've gained in lesson 1, you can confidently approach warm calling in a positive manner, knowing that you've identified a need for a potential customer and you're offering them a solution to a potential problem.

**Chapter 3: Strategic leads**

**Lesson 3: Local strategy**

Hello again, lesson 3 of the warm calling course focuses on strategy. Before we can target potential new customers, we have to define a strategy for our local office. These strategies will vary around the crew depending on what parts of the business lifecycle your office is currently at.

If we take the UK for example, the UK started in 2010, and at that time, we were very new to the UK market, so we wanted to develop our brand awareness. As a result of this, we started by target and EMS companies firstly. And this is because, for every EMS company that we were successful with, it gave us exposure to potentially 5 to 10, 15 OEMs that we hadn't spoken to you before.

If we fast forward 9 years to today, our strategy is completely different. We now have excellent brand recognition, we're also the UK's leader in PCB production. This means that we can be more selective from which customers we choose to target. So, our strategy now is to focus on OEM customers in high technology PCBs. This is important as it gives a sales team structure, a focus, and a target group that they can specifically focus on when looking at lead validation; which will be contained during lesson number 4.

Which leads me on to a very famous Russian proverb, “If you chase 2 rabbits, you will catch neither.” What does this mean? It means that we, as a group, we have to be focused in our approach, we shouldn't be targeting every customer. We know what the target customer is that we're trying to achieve based on the strategy that we define, so let's focus on those because it means that, should we have any success during the warm calling process, it means they will add significant value to it, not only the local office, but us as a group.

**Lesson 4: How to find leads**

Hello again, lesson number 4 of the warm calling course focuses on how to find leads. Now you have a define strategy for your local office, it's time to identify potential new customers that fit the target audience. Fortunately for you, we now have some tools available to us that were not around 5 to 10 years ago, the main one being Google Maps.

I'm not sure if you've used this technique before, but **Google Maps** allows you to enter a postcode and then search in that area for customers within a 5-mile radius, 10-mile radius, whatever you require. And this allows you to find customers close to your office, customers close to other customers, and more importantly, it allows you to target specific businesses. So, for example, you can search for contract electronic manufacturing. You can also search for electronic manufacturing services. You can also search for fire detector manufacturers. All of these means that you can identify customers around a certain location, which already gives you a USP.

And when we consider USPs, we should look at what **successes we've had in the past**. If we've got on our order book already 5 or 6 fire and safety customers, the chances are we are very good at supporting fire and safety customers. So, let's look other potential customers in the sector. Again, using your geographical locations in your Google search function, you can identify other customers that might be either competing with customers you're already supporting or supply similar products. This allows you to take advantage of the USPs you offer the existing customers to potential new ones.

Another tool that we have available to us that wasn't available before is **social media**. At the push of a button, I can see who works for a particular customer and this allows me to identify the correct people to talk to. In addition to this, it allows you to identify if there's any crossovers with your existing network, which might potentially lead to a referral or an option to identify a need that might not be so obvious on initial reflection.

And lastly, please remember that **only 5% of calls are successful**, so it's a numbers game. If we're only talking to 5 customers, the chances are we won't convert any of them. But if we increase the number of leads we have to 100, the chances are that we will convert a minimum of 5 of those.

So, we have to use every single method that is detailed on here to gain as many quality leads that meet our strategy to increase our chances of success. And once we start following this process and we have good quality leads on our sales funnel, I can guarantee you that your successes during the warm calling process will increase.

**Chapter 4: Validation**

**Lesson 5: Why validate?**

These lessons, for me, are the most important part of the warm calling course. Why? Because, for me, this is the part that ensures we can confidently say we are warm calling and not cold calling. Before we've picked up the phone, we've already identified a need and can offer a solution with this customer. So, this allows us to approach in a much more positive way, we can approach in a much more confident way, and if the timings right for the customer, we can categorically say that we can offer something they don't currently have.

Through the validation process, we can be certain that we are talking to the right customers, the customers meet the strategy set out in lesson number 3, and that we have enough information to conduct a helpful conversation with a customer, not wasting time asking questions that can be answered by visiting their website.

NCAB’s biggest fear is that we will become a fat cat. Fat cats do not validate leads, and the next illustration demonstrates this. If we were to take all customers on boards, it means that we will be distracted away from the important ones. Instead, what we should do is validate the good customers, the customers have meet our strategy, meet our target audience, and specifically target those customers to ensure that they're the only ones that we pay attention to. In the meantime, we can politely decline to support any bad prospect customers.

So, the message I would like to leave you with is that actually, we can sell more if we make less calls. In this is because we can target only the customers that fit our strategy, our target audience, and customers actually want to work with NCAB. And this is only possible through strong validation, and this will be detailed in lesson number 6.

**Lesson 6: Validation part 1**

Hello again, lesson number 6 of the warm calling course focuses on validating leads. Validating leads is the most important aspect of the warm calling process, so we've split this down into 2 separate modules. The first module focuses on a number of methods I use to validate my leads.

The first thing I do when I've identified a potential new customer is to **check the credit report**. This is important as it shows if a customer has good credit worthiness and highlights how many employees they have, their potential turnover, and this allows us to identify potentially how much they spend on PCBs.

During this process, if I've **identified any C customers**, I will automatically remove them from my list. This is because warm calling process is quite time-consuming, so we want to be certain that for any customer does convert, it will make an impact to our local business and the rest of the group. So, we will only be targeting B class customers and above.

With this in mind, it’s important to **dream big**. We should be targeting the A+ customers. Until we've been told otherwise, we have to believe that the service and solution that we are offering will help with a need that we've already identified.

And finally, **Google Street view**. Before, the only way you could visit a customer is by jumping in your car and driving to the customer and seeing it for yourself. Times have changed, we can now enter any business in Google and stand outside their premises at the click of a button. It means that we can get a feeling of what the customer looks like. Often, when you look at a website, it's very difficult to actually identify how big that potential customer is. Sometimes, the smallest customer can actually have the best website, and this can trick or mislead you when validating leads, so this gives you a useful insight to potential new customers and their potential size.

**Lesson 7: Validation part 2**

Hello again, lesson number 7 of the warm calling course focuses on validating your leads part 2. So, we've already gone over a number of methods that I use to validate some of my potential new customers, but it's important to ensure we use all of the tools available to us. So, during this lesson, we will focus on a number of other techniques I use to validate my leads.

The first one being, **compare their products to other customers**. If you have identified a potential new customer and their product range is similar to an existing customer, the chances are that their business model, their requirements will be identical to your existing customer. This means we can compare them and see where we believe we can add value, but more importantly, if they will fit with our target audience.

The second is to **use your network to find links**. If a customer contact previously worked at one of your potential leads, asked them about the business, use them to find out information about what is important to them, what is goods, are they a good fit for NCAB, and whether they match our target audience. This can save a lot of time by relying on some of the strong relationships you've already built.

To build on this, we can **check social media platforms**. Again, with LinkedIn, Facebook, Instagram, we can quickly go on and try and identify who our competitors are by seeing who's liking their post, see what they're sharing as this will identify what's important to them, and find out how active they are on social media platforms. This can often identify whether they’re a forward-thinking organization, whether they're looking to expand, or whether they're targeting a particularly new market or product range.

And last, but not least, **ask your customers; who are their competitors**? Who are causing them problems? And the reason we say this is because we went into a customer in the UK and asked this exact question, and they were quite open and honest and said there was a new contract manufacturer to enter the market, they were very competitive on a high HDI pricing, but their quality was atrocious. What this has done is this has identified a potential new customer and already you've identified a need. They have a need for high quality HDI product, and this means that your customers are helping you validate leads.

And when we compare the information we found during the validation process 1 and this process, we can confidently say that we've identified a need and can offer a solution to every single potential new customer on your sales funnel. And this ensures that we can approach the warm calling process in a much more positive manner, and more importantly be confident that we are warm calling instead of cold calling.

**Chapter 5: Just before calling**

**Lesson 8: Find your good place**

Hello again, lesson number 8 of the warm calling course focuses on finding your good place. Now you've defined a strategy, you've identified some leads and you validated them, you probably think it's time to pick up the phone and start calling potential customers. And that's one of the biggest mistakes people made. What's important is finding the right environment for you to make that call. Is that an open planned office? Is that from home? Is it in a quiet space? This is different for every single individual, but it's important that you identify that because it can be directly related to the success rate that you have during this process.

The old saying that, “People can hear if someone is smiling at the end of the phone,” is absolutely true. Think back to a call that you've received, potentially a cold or a warm call, and think about the lasting impression you had. Was that person happy? Were they enjoying their job? Were they looking forward to picking up the phone to you?

So, with this in mind, I want you to find your happy place. To start with, think of an area where you’re most creative. Once you've identified this area, I want you to add things to it to make the process more enjoyable. This can include getting your favorite coffee, listening to your favorite music, bringing in your favorite plant, because what this will do is it means that you will start looking forward to the warm calling process every single week. You create a positive environment which will be reflected in the calls with a customer. This is extremely important because a happy sales person is a successful sales person.

So, before moving on to the next lesson, really spend some time thinking about, “Where is your creative environment?” put the process in place where you start looking forward to warm calling as this will make you more successful moving forward.

**Lesson 9: How to make a warm call**

Hello again, lesson number 9 of the warm calling course focuses on how we should make a warm call. Now, I'm sure all of you are hoping that we have some magical blueprint that we can provide which will guarantee you success, and unfortunately, that isn't the case. What we can do is identify what can increase the chances of your success rate. And you may think this is a very complex process, but it's quite simple. The key to a successful warm call is ***listening***.

Most people do not listen with the intent to understand, but with the intent to reply, and this is a big difference between successful salespeople and unsuccessful salespeople. Now, every single person is slightly different and every single person might have a slightly different sales technique, but the most important thing we can do as salespeople is listen to the customer.

If we understand the fundamentals of a warm call, you'll realize that we are trying to identify a need so that we can offer a solution. We've already gone through a comprehensive validation process, which means during the warm call, we're trying to build on the information that we've already gained; this is where the listening comes in. What we're trying to do is identify a strong enough need that we can decide to try and close on.

Now, at this stage, it’s important to remember our warm calling values; the soft sell is the best sell. It might take 1 call, it might take 10 calls to identify strong enough need to try and close this customer, but it's important that, during these calls, that we're listening and understanding and building our knowledge on this customer.

So, the next time you're in a meeting with a colleague, customer, or supplier, take some time to reflect on whether that individual is listening. Are there people that keep overtalking? Are there people that are missing the point? If so, this is a clear demonstration that the individuals are not listening. And once you become aware of this, it makes you a lot more conscious when talking to your potential new customers.

Before we end this particular lesson, you may have realized that we've only spent a short amount of time focusing on the call itself. This is because your chances of success are determined by the quality of the validation, the leads you have, and also the strategy you put in place. The only important thing to consider when calling customer is listening, and this is because we have to identify a need and then determine when to offer the customer the solution.

**Chapter 6: Keeping it up**

**Lesson 10: Follow up – The extra mile**

Hello again, lesson number 10 of the warm calling course focuses on follow up. Now, before we look at how we should follow up, we've done some analysis on how the follower impacts your success rate.

Now, it's quite surprising to find out only 10% of salespeople call potential new customers more than 3 times. Now, if we remember back to our warm calling values, the soft sell is a best sell. Through the validation process, we know any potential customers that we're targeting are valuable to NCAB, which means that we should be persevering, even when we come up against resistance. And this is because we've already identified a need and can offer them a solution.

So, for a salesperson not to follow up more than 3 times is criminal. We've already identified that we can help this customer, we already know that will make a huge difference to our order book and our business, so why would we not follow up more than 3 times? This is a difference between someone that is successful on a warm call and someone that isn't.

Now, the reason we've done so much validation and ensuring that we are warm calling is to give you as an individual the motivation to persevere. You know this is a potential opportunity that will change your order boom, so I recommend that you continue with these customers until you understand or believe there is no opportunity for NCAB. And this is because we can truly say we are warm calling potential new customers.

The final message from me is that it's never crowded along the extra mile. By persevering with customers when you've identified a need and can offer a solution shows willingness to build the relationship with them. By keeping in regular contact, it demonstrates that we understand their requirements and truly believe we can help them. And moving forward, think about customers, and actually about the possibility the next call could be the one that makes a difference.

**Lesson 11: Follow up – Creative contact**

Hello again, lesson 11 of the warm calling course focuses on follow-up. For this particular activity, I typically have a standard template that has been refined to give a good overview of NCAB group's capabilities whilst not boring them to death with too much detail. These emails can be tailored for specific customer requirements. So, for instance, I may have one for a high quality focus customer, one for a more price sensitive customer, and one with more of a global footprint, as these will then hopefully gain their attention.

We have to get creative in the follow-up process. Everyone will send the follow-up email and most people would give them a call back. What we do in between is what differentiates us from our competitors. And I asked this question of you, how many emails do you receive from potential new suppliers? And now think how many of those do you actually read? In my case, I received between 50 and 5 emails a week, and I only read less than 10% of those emails again because I'm inundated with multiple different suppliers trying to send me cold emails.

Now, I want you to think of how many times do you receive mail through the post at work. Okay, from my experience, I will only receive maybe 1 or 2 items a month. My next question is, how many times do you open that mail? Now, for me, I open every single one of them. Why? Because it’s interesting, I don't usually get post or mail delivered at work.

So, why are we not sending stuff through the post to customers? We have an incredible library of information that we can share with customers, so I think is importantly come up with creative ideas that we can send through the mail. This means that during the email and the follow-up call, we are still present in the customers mind, and it bridges a gap between the initial contact and the 2nd call, 3rd call, 4th call. And this means, the next time that you call them, they'll be aware of you, they'll remember you, they'll actually be aware of some USPs they may not have been during the call. And this ensures that this success rate on the next call or the call after is significantly increased. And this is a difference between going the extra mile and just sending an email. And this is the NCAB way.

**Chapter 7: Outro**

**Lesson 12: Outro**

Hello again! Lesson 12 of the warm calling process focuses on a recap.

Congratulations on completing all of the lessons so far, and before we complete the course, we want to highlight some of the key areas to focus on moving forward. Why is this important? It’s because these areas are most likely to determine your success when calling potential new customers.

So to conclude:

* **Define a strategy for your local office**. This gives you a target audience to focus on and offers you guidance when trying to find new leads.
* **Validate leads**. Once you've got potential new customers that you want to target, let's make sure *they're worth targeting*. This saves time in the long run, and ensures that we are building stronger relationships moving forward.
* **Follow the warm calling values**. These are important because it makes the task much easier, and ensures that you can confidently go into this process knowing that you are warm calling and not cold calling.
* **Always follow up**. It's never crowded at the extra mile. So get creative! Everyone will email, a few people will follow up via calls, but it's what we do in between that determines your success, and whether you're remembered during the second, third or fourth call.
* And remember – **manage your expectations**. Not every call will be successful, but determining what is successful on a warm call is the important part. Getting the opportunity to provide a quote is a win. Getting an opportunity to talk to a customer is a win. Getting to understand the potential new customer more is a win. So remember that only 5% of calls are successful, so manage your expectations and ensure you have enough leads to keep you busy.

Once you've considered these, please remember our minds only hold on to information we have occasion to use, knowledge unused is forgotten. The best way to learn, and to improve, and to increase your chances of success, is by doing the warm calling yourselves. Find your happy place, follow the warm calling values, and ensure that you get creative in your approach to warm calling, as it's the most successful way I've experienced of generating new business here at NCAB Group.

The more people that warm call around the group, will increase the positivity around the activity itself, and this will ensure that we all love warm calling moving forward. And the more people warm calling means that our knowledge of the industry and potential customers will only increase.

Congratulations on completing the course. I just want to thank you for investing the time reviewing the lessons, but more importantly, for investing in yourselves. I generally believe in this process because I've personally seen success from following the step-by-step guide provided throughout the lessons. If you follow the NCAB warm calling values, if you spend time validating your customer leads. If you spend time following up with customers more than two-three times, I can guarantee you'll see success, and that will benefit the rest of the Group.

So I ask that you provide feedback on the course, as this will benefit others through the feedback forms that are provided, or directly to myself or the HR team, and I ask that you keep up the warm calling process. Keep me updated with the success that you have, because ultimately as a group we want to be successful, we want to develop, and we want to help each other develop the business moving forward in the next five to ten years.