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

**Lesson 1: Introduction to Warm Calling**

Before we get ahead of ourselves, let’s first define 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 give you an example: I am a window salesperson; I walk up to a house and see they have four brand-new windows recently installed. I ignore this and I proceed to knock on their door, asking if they want four more windows. There’s no need that I am aware of, but I pursue it anyway in the hopes that I might get lucky. This is a cold call.

A **warm call** is trying to sell to a qualified or validated person, likely having good reason to suspect that they have a need. So let's develop this further. NCAB provides PCBs at the lowest total cost in high-reliability applications where failure is not an option. The customer uses PCBs in systems designed to warn personnel of gas leakages in safety-critical industries. We've identified a need and we're offering a solution – this is a completely different process than a cold call.

And finally – a **hot call** is trying to sell to a person you know to have a very urgent need *right now*. For example, if a customer approaches us and says they require high-reliability PCBs because their current supplier has gone out of business, then this is a hot call. We won’t spend much time on this type of call because they’re usually a much shorter sales cycle, and the sales tend to be much easier – no help needed here, right? 😊

Now that we understand the differences between cold calls, warm calls, and hot calls, it’s clear to see why, at NCAB, we focus on warm calls and avoid cold calling. The benefits of understanding the differences between these types of calls is important as it allows us to approach warm calling in a much more positive manner. This is important, 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 you or a colleague 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?

Now that you understand the differences between the types of calls, your appreciation for warm calling should be clear – that the person making the call has validated whether the other person has a need for their product *and* they’ve made the effort to research their company – that’s fantastic!

Again, do your research, and warm up that call!

**Lesson 2: Warm Calling values**

Before we focus on *how* you 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 things such as a large potential, or a very important person, etc. And what this does is it distracts you from what's important, and that's identifying a need and offering a solution.

The second warm calling value is **Be a helper, not a pitcher**. If we cast our minds back to lesson 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 customer that has a need.

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 one week, ten months or two years, we know that there is a good fit for our companies to work together, and this leads to value-recognition and ultimately stronger relations.

Last, but not least: **Stop chasing prospects, act with dignity**. Desperation doesn't look good on anybody. When we approach these potential new customers, we should act with dignity and command a level of confidence. Not only does this build rapport with this potential new customer, but it also ensures that we start the relationship on an equal playing field. If we are to be successful and convert this opportunity into a new project, it means that in all future negotiations, we have already established ourselves as an equal. This will help us show our unique values and allow us to command higher margins, gain greater respect, and ultimately build a strong partnership between our two companies.

**Lesson 3: Local strategy**

Before we can target potential new customers, we have to define a strategy for our local office. These strategies will vary depending of how mature our business lifecycle is at our individual office.

If we take the United States for example, the US started in 2012, and at that time, we were a new name to the US market, so we wanted to develop our brand awareness. As a result of this, we started by first targeting EMS companies, and this is because for every EMS company that we were successful with, it gave us exposure to potentially five, to ten, to fifteen OEM customers that we hadn't spoken to previously. Fast-forward to today, and our strategy is completely different. We now have excellent brand awareness, and we’re also one of the US leaders in PCB production in our category. This means that we can now be more selective about which customers we choose to target. So, our strategy now is to focus on OEM customers in high-reliability applications. This is important as it gives a sales team structure, focus, and a target group that they can specifically focus on when looking at lead validation (which will be covered in lesson 4).

It cannot be stressed enough that we, as a group, have to be focused in our approach as to which customers we should – and shouldn’t – be targeting. Now that we know the type of target customers we’re trying to engage with based on the strategy that we’ve defined, let’s move on to the next step in the warm calling process – finding leads.

**Lesson 4: How to find leads**

Now that we have a defined strategy for our local office, it's time to identify potential customers that fit the target audience. Fortunately for you, we now have some tools available to us that were not so effective five to ten years ago.

I'm not sure if you've used this technique before, but **Zoominfo** for example, allows you to enter many search attribute including postcode or zipcode to search in a specific area for customers within, say a 5-10 mile radius for example. 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 business types. As another example, you can search for contract electronic manufacturing, or even specific company names. All of this means that you can identify customers around a certain location or industry, which already gives you a greater advantage by just utilizing these technologies.

And when we consider our current customers, we should look at what **successes we've had in the past**. If we already have five or six fire and safety customers in our orderbook, the data shows that we are very good at supporting fire and safety customers. So let's look at other potential customers in the sector. Again, using the geographical locations in your search function, you can identify other customers that might be either competing with current customers, or supply products that are used in conjunction with your current customers’ product. This allows you to take advantage of the successful unique selling points (USPs) that you offered your existing customers to gain potential new customers.

Another effective tool that we have available to us is **social media**. At the push of a button, I can see who works for a particular customer, or identify the correct people we wish to speak with. In addition to this, it allows us to identify if there's any crossovers with your existing networks. These cross-connections could lead to a referral, or maybe even lead to uncovering a need that might not have been so obvious in your initial review.

And finally, please remember: **only 5% of calls are successful**. So it's a numbers’ game in a way. If we're only talking to five potential customers one time, chances are we won't convert any of them. But if we increase the number of contacted leads to a hundred, chances are that we will gain five new customers.

So, to increase our chances of success, we have to use the methods and technologies available to us to gain as many qualified leads that meet our defined strategy as possible. And once we start following this process and we have good quality leads in our sales funnel, I can guarantee you that your successes during the warm calling process will increase.

**Lesson 5: Why validate?**

These lessons for me, are one of the most important part of the warm calling course.

Through the validation process, we can be certain that we are talking to:

1. the right customers,
2. the customers that meet the strategy we set out in our previous lessons, and
3. we have enough information to conduct a helpful conversation with a customer, and not waste time asking questions that can be answered by visiting their website.

One of NCAB’s biggest concerns is that we will become a fat cat. Fat cats do not validate leads, as the next illustration demonstrates. If we were to take just any customers on board, we will be distracted away from the needs of important customers, by the needs of less important or wrong customers. Instead, what we should do is validate the good customers – the customers that match our strategy, those that meet the specifics of our target audience – and focus on those customers to ensure that they're the only ones that we focus our attention to. In the meantime, we can politely decline to support any prospective customers that do not meet this criteria.

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

**Lesson 6: Validation part 1**

One of the first things you can do when identifying a potential new customer is to **check their available financials**. This is important as it shows if a customer is worth pursuing – or not! Also, it highlights how many employees they have, their potential turnover, and even allows us to identify a rough estimate of how much they spend on PCBs.

During this process, if you've **identified any C-customers**, you should automatically remove them from your list. This is because the warm calling process is quite time-consuming, and we want to be certain that we focus on only sizeable A+, A and B customers as it will make a significant impact not only on our local business, but to the rest of the group as a whole. So, we will only be targeting B class customers and above.

With this in mind, it’s important to be bold and **dream big**. We should be confident in targeting these large customers. Until we know 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, **online platforms** that allow you to see, and even visit, virtually. Before, the only way you could visit a customer is by jumping in your car and driving to the customer’s site and seeing it for yourself. Times have changed – we can now enter any business in any number of online platforms and stand outside their premises or even sit in a meeting with them at the click of a button. It means that we can get a feeling of what the customer looks like in real-time. Often, when you look at a website, it's very difficult to actually identify the size of a potential customer. 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 relative size.

**Lesson 7: Validation part 2**

During this lesson, we will focus on a number of other techniques we currently use to validate leads.

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

The second is to **use your network to find links**. If a current customer contact previously worked at one of your potential lead accounts – ask them about the business, use them to find information about what is important to them, 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** as well. Again, with any number of social media platforms, we can quickly go on and try to identify who our competitors are by checking to see who's liking our prospective customer’s posts. Also, we can see what they're sharing as this will identify what's important to them and how active they are on social media platforms. This can often identify whether they’re a forward-thinking, whether they're looking to expand, or whether they're targeting a particularly new market or product.

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

When we compare the information we found during these validation processes, we can confidently say that we've identified a need and can offer a solution to every single potential new customer on our 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.

**Lesson 8: Find your good place**

Now that you've identified a defined strategy, identified some leads and validated them, what's important is finding the right environment for you to make a call. Do you prefer an open office plan? Is it calling from home? Is it in a quiet space? This preference is different for every individual, but it's important that you identify your preferences because it is 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 – cold call 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 and calling you? Could you tell?

So, with this in mind, I want you to find your happy place. To start with, think of an area where you feel 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 facilitate an atmosphere that will have you looking forward to the warm calling process every single week. The environment you create will be reflected in your calls with customers. This is extremely important because a happy sales person is a successful sales person.

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 as you move forward.

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

Now, you may be hoping that there is some magical blueprint that we can provide that will guarantee you success, and unfortunately, that isn't the case. What we can do is to identify steps you can take to increase your chances of success. 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, everyone is slightly different, and everyone might have a slightly different sales technique, but the most important thing we can do as salespeople is to listen to the customer.

Understanding the fundamentals of warm calling will allow you to 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 that during the warm call we can 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 so that we can act and try to close on an agreed-to solution.

Now, at this stage, it’s important to remember our warm calling values; the soft sell is the best sell. It might take one, or it might take ten calls to identify a strong enough need to try and close this customer. What’s important is that, during these calls, we listen and focus on 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 the strategy you put in place. The only important thing to consider when calling a customer is listening, and this is because we have to identify a need and then determine when to offer the customer the solution.

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

Now, before we look at how we should follow up, we've done some analysis on how the follow-up impacts your success rate.

First we found out: “**When do customers buy?**”. 1st contact? No, and not the second either. One out of ten buy **here**, and another one **here**. It turns out that **80%** of customers buy **after** **5** contacts or more.

Next question: “**When do sellers give up?**”. 1st contact? **Yes**, 5 out of 10 give up here. 2nd contact? 3 more disappear, and one more after the 3rd contact. Anyone left? **Yes!** **One** brave salesperson will stay until the customer is ready to buy. Let’s agree that this person should come from NCAB, OK?

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 orderbook and our business, so why would we not follow up more than three 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 book, so I recommend that you continue with these customers until you understand or believe there is no opportunity for NCAB.

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.

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**

Lesson 11 of the warm calling course focuses on follow-up. For this particular activity, it’s good practice to have a standard template that you create to give a good overview of NCAB Group's capabilities with the aim of not overwhelming them with too many details. These emails can be tailored for specific customer requirements, such as, high-quality focus, or price-sensitive focus, or a focus on our global footprint. This nuanced approach will increase your chances of gaining their attention.

We also have to get creative in the follow-up process. Everyone will send follow-up emails, most people would give call-backs. What we do in between is what differentiates us from our competitors. So, ask this question to yourself: how many emails do you receive from potential new suppliers? And now, think how many of those do you actually read? In many cases, we receive between 5-50 emails a week, and we read less than 10% of those emails. Why? Because we’re inundated with many different vendors trying to send us cold emails.

Now, I want you to think of how many times you receive physical mail delivered to you at work. From experience, we will only receive maybe one or two items a month (if even that much). The next question is, how many times do you open that mail? Most open every single one. Why? Because it’s interesting – we don't usually get mail or post delivered at work.

So, in the spirit of being creative, why would we not be making contact through all means available to us? We have an incredible library of information that we can share with customers, so it’s important that we come up with creative ideas to share that information with potential customers as well. This means that during the emails and the follow-ups that we have, we will still be present in the customer’s mind, and it bridges a gap between the initial contact and the second, third and fourth call. And this means, the next time that you call them, they'll be aware of you, they'll remember you, and they'll already be aware of some of our unique selling points. And this ensures that the success rate on the next call or the call after that is significantly increased. This is the difference between going the extra mile and just sending an email. This is the NCAB way.

**Lesson 12: Outro**

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 you’ll build stronger relationships moving forward.
* **Follow the warm calling values**. These are important because it makes the task much easier, and it also 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 along the extra mile. So get creative! Everyone will email, a few will follow up with calls, but it's what we do in between that determines your success, and whether you're remembered during that 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 better understand a potential new customer is also a win. Remember – 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 key areas, please know that our minds only hold on to information we frequently 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 yourself. Find your happy place, follow the warm calling values, and experiment – get creative in your approach to warm calling. It's the most successful way of generating new business here at NCAB Group.

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