

PRE-CALL NOTES: *(10-15 minutes before call)*

1. **Open their company website**
2. **Have pen + notepad ready** *(do not use computer, it's too loud)*
3. **Have an idea which platform might work best** *(Facebook or Google)*
4. **If need be, get up and strike some power poses** *(Amy Cuddy power poses)*
5. **Get into rapport first by generating warm feeling in your stomach**
6. **Your objective is to gather data and sell the next call**
7. **Remember, you're not below or above them, you're both experts in your fields**

1. Quick Chat for 2-3 *(Build rapport)*

- Hey ____, this is Juan from ____ how's your *(day of the week)* going so far?
- Where are you based out of?
- Is that where you're originally from or did you relocate??

2. Pre-Frame and Set The Agenda

- **Ok great, so here's how these calls usually are structured: we start off by getting to know a bit about your business and what your goals are. The whole purpose of that is to make sure we've actually got a solution to help you (slight pause).**
- **After that we can dive into how we help our clients and if it sounds like we would be a good fit, we can discuss next steps OR, I can direct you to another source that may be a better fit for you. Sound fair? Okay, let's dive right in!**

3. Figure Out Their Current Situation

- **What types of new (*clients/jobs/services/patients*) are you currently looking to take on more of and focus on?**
 - *Are they looking for all types of customers/jobs/patients or just a specific type?*
- **I know every business is a bit different. So in your case, what would you say the average (*project, customer, patient*) is worth to you and how long do they typically stay?**
 - *Need to know the average a customer is worth to them and that customer's LTV.*
- **What are you currently doing to generate new customers and approximately, how many new customers are you bringing in each month?**
 - *We want to know if they are already doing advertising, have a marketing strategy or just relying on referrals and word of mouth and # of new customers.*
- **What does your sales process look like from initial inquiry to paying customer?**
 - *We want to know who specifically handles the leads/sales & that they have process.*
- **How many new customers are you looking to add each month on top of what you're already doing? (10,20?)**
 - *We want to know what's their capacity for more customers*

4. Find What Success Means To Them & Insert Yourself In The Picture

- **Ok great, ___ I really appreciate you sharing that with me.**
- **One of the things that we're always looking to do is enhance our service, so let's say that we've been working together for 6 months now, what would need to happen throughout that time in order for you to feel like it was a success?**
- *(If they have trouble answering that... you can say)* **essentially, what would an ideal relationship look like to you?**

5. Give An Overview Of Services + Next Steps

- **Ok great, it sounds like there's an opportunity for us to work together to help you grow [COMPANY].**
- **Let me go ahead and give you an overview of what we do. So, I don't know if you had the chance to review our website, but if you did, you would see that we help businesses grow through digital paid advertising and we do this by putting your business in front of your target customers online.**
- **Typically, we'll have certain offers that grab your ideal customers attention and directs them to either call or fill out their information to learn more. That information then gets routed to you immediately through our automation software.**
- **Our next step would be to set up a follow up call where I can walk you through our entire process and system step by step through a screen-share presentation.**
- **Do you prefer mornings or afternoons?**
- **Ok great, I'll send you over a calendar invite for Xday at X time. Talk to you then!**