5 Ways to Automate The Cold Call Process
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EXECUTIVE SUMMARY

It’s hard to dispute that cold calling yields one of the highest financial returns for new business development. This is why it’s an important consideration in the mix of a company’s new business development strategy.

If implemented properly, cold calling is arguably one of the most cost-effective methods of finding new business, one of the best ways of delivering a sales message, and a direct source for understanding the wants and needs of the prospective buyers in a market and the activities of competitors. If implemented poorly, cold calling can not only harm a company’s reputation, but it can be a huge energy drain on sales staff and can hurt overall productivity.

Companies fail to realize that cold calling is not a beginner’s activity. It requires training, skill, persistence, patience, organization and consistency to nurture a cold prospect with well-timed communications until the prospect becomes a sales-ready lead.

Fortunately, tools exist that can make cold calling more efficient for sales reps. This white paper will address five key areas of cold calling that present some of the biggest challenges for companies and salespeople. It will discuss the tools that can automate these processes and tasks to accelerate productivity, create consistent and predictable results, and remove the burden of manually managing many of these processes. This makes it easier for salespeople to remain engaged and motivated in their cold calling efforts.

The five areas we will look at are:

- Call Automation
- Email Automation
- Workflow Automation
- Process Automation
- Performance Insight

CALL AUTOMATION

Problem

Cold calling is a numbers game. It takes a large number of calls to get the desired result. The biggest factor in determining daily productivity in this area is how proficient each individual salesperson is at making each call. This includes navigating through a list of leads and determining the priority in which each lead should be called, the speed at which they can manually dial a number, the time it takes to leave a voicemail when there is no answer, the time it takes to type out a note regarding the call, dispositioning the lead, and then falling back to the list to repeat the process.

The average salesperson makes only 8 dials per hour. [Source: Ovation Sales Group]

Only 2% of cold calls result in an appointment. [Source: Leap Job]

15% of sales reps’ time is simply leaving voicemails. [Source: RingLead]

71% of sales reps say they spend too much time on data entry. [Source: Toutapp]
Solution
A number of automation tools exist to reduce the repetitiveness of cold calling while improving productivity:

Auto Dialing – By removing the need for the salesperson to dial a number by hand, you remove a tedious task from the salesperson’s day and you increase productivity. There are several forms of auto dialing available on the market today: progressive dialing (one-to-one auto dial), preview dialing (click-to-dial), and predictive dialing (one-to-many auto dial).

Voice Drop – Drop a prerecorded message on a voicemail as soon as the voicemail system picks up the call. Doing this eliminates the time it takes the voicemail greeting to play as well as the time it takes to leave a voicemail, which can average about a minute per call. Voice drop can save a salesperson over an hour a day that can be better used on other revenue generating activities. Just as importantly, voicemails will be delivered with the same tone, energy and professionalism from the first voicemail of the day to the last.

One-Click Results – Notes and call results can be saved in the system with the click of a button. Not only does this disposition calls, it removes another time-consuming task: opening a window, leaving a note, waiting for the system to save the note, then exiting the contact to move onto the next. Instead, all of this can be done in a single, automated step.

The result is more than just increasing the speed at which a salesperson can make calls; it’s increasing productivity while maintaining quality. It’s repeating the process as many times as possible, ensuring the energy and professionalism on the last voicemail is the same as the energy and professionalism on the first voicemail. With this type of consistency you have a real baseline to make decisions on performance.

Increase productivity with
• Auto dialing
• Prerecorded messages
• One-click notes / results

EMAIL AUTOMATION

Problem
Email nurturing and follow-up are vital ingredients in the cold call process. Emails used in conjunction with calling increase contact rates. In fact, prospects who receive an email are 16 percent more likely to respond to a call (source: Datanyze.com). Studies show that using email to nurture leads has a tremendous impact on conversion, quota attainment and a company’s ROI.

Email conversion rates are three times higher than [connecting through] social media, with a 17% higher value in the conversion. [Source: McKinsey & Company]

Companies that excel at lead nurturing have 9% more sales reps making quota. [Source: CSO Insights]

Companies that nurture leads make 50% more sales at a cost 33% lower than non-nurtured leads.
[Source: Forrester Research]
It takes time to create different emails to send throughout the cold call process. Even if standard emails are available for a salesperson to copy and paste, it requires the salesperson to navigate through multiple windows and then manually alter the email to personalize it, and then manually attach any documents that need to be sent with it. Then the salesperson needs to manage lead nurturing campaigns. An effective nurture campaign can last months, and it takes skill to plan out the timing of when nurture emails should be sent and what content should be included. The salesperson will need to set reminders for each lead at each stage of the nurture process. This can be a massive productivity drain for a salesperson to manually manage, which is why most don’t bother.

**Solution**

Automating your emails can add tremendous value to sales reps’ efforts without creating another obstacle for them to manage:

**Email Templates** – Companies can create a library of custom templates based on unique conversations with prospects, with fields that are automatically populated with the prospect’s name and other appropriate information. Maybe the prospect wants information on a specific product or said they were using a competitor’s product or service. Either way, you can have custom emails with content and attachments ready to send with just a couple clicks.

**Triggered Emails** – These are pre-defined emails that merge automatically with the contact’s information. There can be different emails automatically sent depending on how the call is dispositioned. For instance, you can create emails to complement each voicemail left. If contact is made with the prospect or an appointment is set, emails can automatically be sent with supporting links, important information about your company’s product or service, or they can even trigger appointment reminders to send out the day before your scheduled appointment.

**Email Drip** – a series of sequential emails designed to nurture a cold prospect that automatically initiates based on lead status or how a lead is dispositioned. For example, you’ve made eight unsuccessful contact attempts over a two-week period to a lead. You can set an email to send out thirty days later with product comparison, then another thirty days after that about your latest white paper and a link to download it, then another email 60 days after that promoting your blog. The possibilities are endless, and any type of content and information can be attached to accompany the email.

The biggest benefit in automating your emails is that it can add tremendous value to the effort your salespeople are putting forth making cold calls without creating another obstacle for them to manage.

**Increase the value of a rep’s effort with:**

- A library of custom emails
- Pre-defined emails, triggered by events
- Sequential emails designed to nurture cold leads
WORKFLOW AUTOMATION

Problem
Managing the flow of leads can be a daunting task in any environment. The high-volume environment of cold calling just amplifies the complexity. Salespeople are expected to contact each lead a specific number of times over specific intervals, prioritize the most important leads to be called first, keep track of appointments and follow-ups, ensure all leads are contacted equally and fairly, and manage new workflows as leads progress through the sales funnel.

Solution
Automating your sales workflows and lead management strategy can greatly improve revenue generation. This point cannot be stressed enough. It is imperative that a company has a well-defined, standardized lead management strategy for the flow of leads through the sales funnel and a method to hold salespeople accountable to the implementation of these strategies. Without consistent behaviors yielding predictable results the decisions made around marketing and lead generation efforts will be uneducated guesses at best. Here are a few ways lead management can be automated in the cold calling process:

Queue-Based Architecture – This revolutionary approach to lead management automates the flow of leads. Instead of working from a list view to manually select a lead to call, the default view for the salesperson is the next-best lead to call, based on prioritization and logic that's defined by management.

Customized Lead Workflows – This is where management defines the workflow logic that the queue-based architecture automates. Set up these workflows to determine what happens to each lead after a call, based on how the salesperson dispositions the lead. Management can define when that lead should be called again, the cadence of the next call, if an email should go out along with the call, and if the lead status should change. The system automatically implements all those functions and processes when the lead is dispositioned.

Only 33% of inside sales rep time is spent actively selling. [Source: CSO Insights]

In 2007 it took an average of 3.68 cold call attempts to reach a prospect. Today it takes 8 attempts. [Sources: TeleNet and Ovation Sales Group]

The average salesperson only makes 2 attempts to reach a prospect. [Source: Sirius Decisions]

80% of sales require 5 follow-up calls after the meeting. 40% of salespeople give up after 1 follow-up. [Source: The Marketing Donut]
A business has the capability to detail out the very best practices for their industry, or even take the processes of their very best salesperson, and then build a workflow around that to be implemented across the entire sales floor automatically.

### PROCESS AUTOMATION

#### Problem

During the cold call process, salespeople should be communicating a consistent message to cold call prospects. This includes voicemail messages, call scripts and objection scripts. How each salesperson delivers the company’s message will either build trust and confidence in their prospects or undermine efforts to engage them.

On top of consistency in the delivery of sales messaging, one of the most effective tools a salesperson has when engaging a prospect throughout the cold call process is information that’s been gathered about the prospect during previous calls. Gathering information about a prospect helps a sales rep understand a prospect’s hot buttons, his or her place in the buying process, and ways to further build the relationship.

Between managing leads and workflows, to delivering consistent sales messaging and handling objections, a salesperson has a lot to juggle. This is difficult for even the most organized salesperson to manage well. The more a salesperson is focused on managing a complex sales process, the less focused they will be on the main goal: engaging in quality conversations with suitable prospects. Automating the sales process is important to remain focused on this goal, which is what will help drive sales success at the end of the day.

Automated lead management improves follow up persistency, ensures every lead is contacted, and that every lead is handled the same way every time. This type of consistency offers management true clarity around sales performance and lead performance. When management knows that performance is based on skill, technique, or lead quality, and not effort, organization, human error, or personal bias, then making decisions around training, lead spend, and marketing effort becomes a much easier task for management.

### Automate your sales workflow with:

- A queue-based flow of leads
- Workflow logic defined by management

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**Companies that automate lead management see a **10%** or greater increase in revenue in 6-9 months.**

[Source: Gartner Research]

**Companies utilizing queue-based technology in lead management see a **30%** reduction in lead decay.**

[Source: VanillaSoft]
Solution
The goal here is to remove organization obstacles, improve consistency in sales messaging across the sales floor, and reduce administrative tasks that can slow down a salesperson's productivity. These tools can help:

Logical Branch Scripting – This is an algorithmic-based approach to sales scripts that adapts to the conversation based on the prospect's responses. At each stage of a conversation, response options are available for the salesperson to select. Based on how the prospect responds, different scripts can automatically and instantly load to transition smoothly into the next phase of the conversation. Data from the prospect's lead information will automatically populate in the script, removing the need for the salesperson to mentally fill in the blanks. This leads to more fluid and natural speech interaction with the prospect. These can be used for the sales pitch, handling objections, product value and benefit suggestions, and any other messaging assistance you'd like to provide your salespeople.

Data Collection – Data entry fields are inserted directly into your scripts that the salesperson can fill in as they progress through a sales call. This information will automatically populate in the script, removing the need for the salesperson to mentally fill in the blanks. This leads to more fluid and natural speech interaction with the prospect. These can be used for the sales pitch, handling objections, product value and benefit suggestions, and any other messaging assistance you'd like to provide your salespeople.

Custom Fields – Management has the ability to create custom fields that are relevant to their sales process. Information about competitors, budgets, decision makers and demographics can be collected and made available for salespeople to refer to on future calls. These fields can also be used to filter and sort leads based on criteria within those custom fields.

Build relationships with:
- An adaptive sales script
- Easy data collection about prospects for use on future calls

PERFORMANCE INSIGHT

Problem
It's not enough to just increase productivity, efficiency and performance through automation strategies. Those functions are all about making the sales engine perform at its peak level. Making sure you are steering the company toward the desired destination requires clarity and insight into the performance of leads, the different elements in your lead management strategy, and a sales reps' skill and technique.

Success often requires tweaking lead workflows, adjusting sales messaging, expanding or shrinking your lead type portfolio, changing spending based on performance, and helping salespeople develop their skill and technique on the phone. Having the best tools at your disposal can be rendered obsolete if you are working in the dark.

Solution
It's important to have a full suite of tools that not only give insight into sales and lead productivity and performance, but also give management true control over the decision-making process:

Live Call Monitoring – Listening in on live calls can provide salespeople with immediate feedback and assistance during the call, and enable them to have post-call training sessions to discuss areas of opportunity.
Call Recording – Recording calls and automatically attaching them to the contact provides salespeople and managers with quick access to those recordings. Recordings can also be sorted and searched for using a number of filters for general call review or topic specific training classes.

Activity Dashboard – User-friendly dashboards show call data in real time to give a glimpse of daily productivity and performance statistics.

Reporting – Custom reports can dissect leads, campaigns and sales performance. Companies are able to see where breakdowns in the sales cycle occur so they can train around them to improve specific behaviors. Good reporting provides a glimpse at your overall speed to lead, speed to contact, follow-up persistence, conversion rates, and call productivity over user-defined periods of time.

Gain insights with:

- Live call monitoring
- Call recording
- Productivity and performance statistics
- Custom reports

Closing

With the potential to yield a high ROI, there’s no doubt that cold calling is an important component in the mixture of many companies’ new business development strategy. With the use of sales automation software and technology to streamline processes, both prospects and reps can experience better cold calls through a variety of techniques that maximize the efficiency and effectiveness of the sales process. In the end, technology and automation is about removing obstacles and increasing the number of opportunities for salespeople to engage in quality conversations with prospective buyers. The right sales automation software can keep the process efficient and lean, increasing productivity and — most importantly — revenue.

VanillaSoft is a queue-based sales automation solution that offers a full suite of features under a single platform that automates all areas of cold calling discussed in this white paper. If you’d like to learn more about how VanillaSoft can help you get more out of your cold calling efforts, contact us to schedule a product demo today!

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