

# ARE WE A FIT CALL

OUTLINE & EXERCISE

# CALL OUTLINE

## INTRODUCTION

Keep it short and simple. Start by saying who you are and where you're calling from. If necessary, ask if you're talking to the right person before moving on.

*Example:*

*Hey {first name}. This is {your first name} from {your company name}.*

## OPENER

This is the ticket to the rest of the conversation. Your only goal in this section is to build rapport. Always try for a more personalized route. Create a bridge between the intro and the reason for calling by mentioning something you have in common. You can find recent social posts of theirs, awards, schools, references, etc to indicate you've done some level of research, which builds trust.

*Example:*

*How's it going today? [pause]*

Note: This may feel weird at first but you want this to feel as natural as possible. Just engage in conversation. Some alternatives to this question:

- *Happy {day of the week}! How's it treating you so far?*
- *How are you?*
- *Is this {prospect name}?*
- *I saw your recent LinkedIn post about... and I thought it was...*

## REASON FOR CALLING

Why are you calling? What have you got to offer? The goal here is to get straight to the point and to show how you can help your prospect.

*Example:*

*So, look, I know you're busy. I'll get straight to the point. The reason why I'm calling is to get some time on your calendar.*

## VALUE PROPOSITION

Also known as "the bridge", this is what connects your reason for calling to why they should care.

*Examples:*

- *I've been following your upcoming event on [specifics about the event - name/topic/theme] and as a [expertise] speaker, I've spoken for a few similar conferences.*
- *I've been doing some digging on your upcoming event and was wondering - Have you finalized your speakers yet?*
- *I'm really excited about your upcoming event and was wondering - are you open to the idea of adding content around how to [insert the problem you solve].*
- *I help companies [a problem you solve] and was wondering - are you open to a conversation about how to [outcome you tend to produce].*

**If "Yes"**, continue

*Do you mind if I ask you a few questions?*

Note: If you're REALLY confident this lead is qualified, don't bother with the questions, just move straight to the close of setting up a strategy session to talk more deeply.

## QUESTIONS

This is a place for you to ask no more than 3 questions to qualify the prospect before deciding if you want to set up a call with them. If you know you want to set a strategy session up to talk more deeply, just skip to the close.

*Examples:*

- *If you could get one outcome out of your event this year, what would it be?*
- *What's been great about previous events you've done, and what's been a not-so-great experience?*
- *Would it be valuable to consider more continued training after the event?*
- *How do you handle training for [your expertise] in your company?*
- *Do you ever bring in outside experts to help solve [the problem you solve]?*
- *What does your internal event schedule look like?*

## CLOSE

This isn't about closing the deal. This is about getting a deeper conversation scheduled so you can do a proper discovery and pitch.

*Example:*

*I thought the best place to start would be a 30-minute strategy session where we talk about some of your goals for the event and see if there's any alignment in partnering. Are you open to that?*

Then, schedule the call and let them know you'll email them with a few links to check out ahead of time

*Start outlining your own "Are We A Fit" call script!*



"ARE WE A FIT"

# CALL EXERCISE

## INTRODUCTION

*Example: Hey {first name}. This is {your first name} from {your company name}.*

## OPENER

*Examples:*

- *How's it going today? [pause]*
- *Happy {day of the week}! How's it treating you so far?*
- *How are you?*
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- *I saw your recent LinkedIn post about... and I thought it was...*

## REASON FOR CALLING

*Example: So, look, I know you're busy. I'll get straight to the point. The reason why I'm calling is to get some time on your calendar.*

## VALUE PROPOSITION

Examples:

- *I've been following your upcoming event on [specifics about the event - name/topic/theme] and as a [expertise] speaker, I've spoken for a few similar conferences.*
- *I've been doing some digging on your upcoming event and was wondering - Have you finalized your speakers yet?*
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## QUESTIONS

Examples:

- *If you could get one outcome out of your event this year, what would it be?*
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# OVERALL PRO TIPS

## OBJECTION HANDLING

There's no getting around objections in sales. It's just the name of the game. Especially when you're reaching out fairly cold, you can experience some tough objections. BUT, just know, you're sharpening your blade. The more objections you experience, the better you'll become at overcoming them.

Here are some common objections and how to handle them:

- **"I don't have time to talk"**: The prospect is trying to get you off the phone as soon as possible. Ask, "When's the best time for a quick 5-minute call?". By offering a short amount of time, you're showing a minimal investment and you respect that they've said now isn't a good time to talk.
- **"Let's talk in {X} time"**: Textbook! This is usually because the prospect isn't quite ready to think about the buying process yet. Sometimes there are other decision makers or simply, that it's not a good time. When you get this objection, it's good to clarify: "What does your decision-making process look like for something like this?".
- **"Just send me an email"**: This will pop up often. That's okay! If you don't have an email, ask for it, and ask them what information they want it to include. Then, send a series of follow-ups with your qualification questions (above) one at a time. The goal of this dialogue is to get them interested in having a conversation with you.

## MAKE OUTREACH A SACRED HABIT

What's the saying? Old habits die hard? Well, so do the lack of habits.

Block off sacred time every week (ideally every day) to complete your sales outreach. If you're calling, generally aim for between 9 am and 11 am, and reward yourself after making all your calls.

Reinforce the behavior early on and grit through it. Remember discipline where motivation lacks.



## PLAN, EXECUTE, TEST

This outline is the plan. You calling is the executing. DO NOT FORGET TESTING. What do I mean by that?

This outline is just a starting point. You're going to learn what works and what doesn't. Update this outline as you go.

Test different phrasing for your value proposition or reason for calling.

Test new methods of personalization - how can you be more relevant?

When someone responds favorably to what you just said, write it down - we call these "lean in moments".

## MIRRORING

Have you ever had a conversation with someone whose energy is completely different than yours? Think textbook door-to-door salesman after you've had a long day.

Your mood is neutral at best and theirs is extremely loud, peppy, and bubbly.

Often, people find this inauthentic and immediately shut the door.

Within the first 30 seconds of the call, assess what their mood is like. Try to match their cadence, tone, and way of talking.

The fastest way to build rapport is to mirror.

# ADDITIONAL RESOURCES

## PODCAST EPISODES

ON THIS EPISODE OF SPEAKERFLOW'S  
**TECHNICALLY SPEAKING**



**Awareness To Action: The Importance Of Understanding Your Buyer's Psychology**

WITH GUEST EXPERT CHRIS GRAY

PARENTAL ADVISORY  
EXPLICIT LANGUAGE

ON THIS EPISODE OF SPEAKERFLOW'S  
**TECHNICALLY SPEAKING**



**The Real Truth About Selling For Experts**

WITH GUEST EXPERT PHIL GERBYSHAK

PARENTAL ADVISORY  
EXPLICIT LANGUAGE

ON THIS EPISODE OF SPEAKERFLOW'S  
**TECHNICALLY SPEAKING**



**Become a Sales Hunter: Selling With Confidence And Integrity**

WITH GUEST EXPERT MARK HUNTER

PARENTAL ADVISORY  
EXPLICIT LANGUAGE

ON THIS EPISODE OF SPEAKERFLOW'S  
**TECHNICALLY SPEAKING**



**Email Outreach And Marketing Not Working? Listen To This.**

WITH GUEST EXPERT JASON BAGLEY

PARENTAL ADVISORY  
EXPLICIT LANGUAGE

ON THIS EPISODE OF SPEAKERFLOW'S  
**TECHNICALLY SPEAKING**



**The Power Of Prospecting: Everything You Need To Know**

WITH GUEST EXPERT SAM RICHTER

PARENTAL ADVISORY  
EXPLICIT LANGUAGE

ON THIS EPISODE OF SPEAKERFLOW'S  
**TECHNICALLY SPEAKING**



**The Biggest Sales Mistakes Even The Largest Companies Make**

WITH GUEST EXPERT JASON EATMON

PARENTAL ADVISORY  
EXPLICIT LANGUAGE

## BLOG ARTICLES

- "[25 Expert Cold Calling Tips](#)" from Yesware
- "[14 Proven Tips For Getting Past The Gatekeeper](#)" from Sales Hacker

# Questions or Comments?

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Contact us at  
**hello@speakerflow.com**  
and let us know what you  
think!

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