The Ultimate Guide to B2B Telemarketing
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“it can get you in front of prospects you really want to connect with.”
What is Telemarketing?

Telemarketing is the act of marketing a product or service over the telephone. It differs from telesales in that telesales is the direct sale of a product or service over the phone, resulting in a transaction. Telemarketing is about getting leads into the pipeline.

The aim of a telemarketing call is to get a face-to-face appointment for a sales representative, whereas with telesales it is very often to achieve a sale over the phone. Therefore, the skills required to be a telemarketer, especially in B2B are quite different.

Advantages / Disadvantages

The main advantage of telemarketing is that it can get you in front of prospects you really want to connect with. Done correctly, it can start filling the top of your pipeline with quality appointments, and can equally give you a more complete data set, with current service provider information, call-back dates and organisational structure.

What telemarketing does require, however, is input both before and after the campaign – before, in that good, clean data has to be supplied to the telemarketer, and afterwards, in that data has to be maintained, and appointments have to be nurtured so that they don’t drop out.

Campaign – pre-campaign

Before launching a telemarketing campaign, you have to consider the following points:

- What are your objectives?
- What do you have to say to the prospects?
- Who do you want to get in front of?
- What does success look like?
- How does this fit in with other marketing campaigns?

A telemarketing campaign can have many objectives – from pure appointment-setting to data cleansing and market research. Step back first of all and decide what it is you want to achieve. If it’s leads – how many leads do you want, and how are you going to define what a lead is / isn’t?

Decide who it is you want to speak to. This helps you define your data set. For instance, you may want to speak to a certain level of hierarchy – directors, for instance. It’s important to get in front of decision-makers, so define who makes the decisions among your prospect organisations.

Decide equally what types of organisation you want to speak to. What size are they? Do they have a specific profile – are they from the same industry, for example? You may want to target verticals and target your messaging accordingly.
Data

The key to any good telemarketing campaign is data. If you have good data, you'll stand a much higher chance of getting through to the right people.

<table>
<thead>
<tr>
<th>☹ Three types of bad data</th>
<th>☺ Three types of good data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data that has been sold many times</td>
<td>Data that is consistent, e.g. company size or sector</td>
</tr>
<tr>
<td>Inaccurate or missing fields within the data</td>
<td>Data profiled on your existing clients</td>
</tr>
<tr>
<td>Old data: people have moved on</td>
<td>Clean data: recently updated</td>
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</table>

Good data is YOUR data. When you buy data in from an external source, it will very often have been used many times, and gatekeepers will be familiar with telemarketers calling up their bosses. Therefore, they get better at blocking you!

The best data is data that you own – and only you own. Yes, there may be clashes with external data sources – but the key is to maintain your own data set, and keep it maintained.

You may wish to hire an external company to “clean” or “enhance” the data for you, and this is a good exercise every 6 months or so. But your data is crucial to a good telemarketing campaign.

Data is only as good as your campaign! Ensure that you have profiled your data set sufficiently – you don’t want to be running the same message to organisations of vastly differing sizes, or from different sectors.

A good data set is homogenous. You may have profiled your existing client base and decided that you work with a large number of mid-sized construction companies. There’s a good profile to go after – there’s a high chance that with a good, strong message, you will achieve much better results.

“the best data is data that you own”
What data do you need?

When considering a telemarketing campaign, you need to give the telemarketers the following items of data most of all:

- First name
- Surname
- Job title (free data)
- Job role (drop-down)
- Company
- Phone number
- Last contacted date
- Notes from previous calls

If you don’t have a data set in-house, then buy it in from a data house. This is your “Global Prospect Database” from which you can segment campaign data.

But here’s the key – buy it once. Don’t keep going back to the data house and buying in piecemeal. Place a big order – own it, clean it, and plan your telemarketing campaigns for the long term.

Ask yourself:

- How many sales do I need to make over the next 18 months?
- Therefore, how many appointments do I need to make?
- On that basis, given conversion rates - how many items of data do I need?

Collecting the right data \rightarrow Convert data to quality appointments = Higher amount of sales converted
How to keep your data clean

The 7 commandments of clean data

1. Don’t buy in data from external sources and expect to use it immediately.
2. Run a “cleanse” campaign first – to double-check correctness of data.
3. Tell everyone who has access to your CRM that keeping data up to date is important.
4. Keep an audit trail of changes, so that you can track any bad data input & correct.
5. Use drop-down data fields instead of free text wherever possible – this ensures consistency.
6. If you export data, ensure that when you import refreshed data, it’s in exactly the same format.
7. Ensure that post-campaign data is always imported back into your CRM.

Remember the mantra of every good telemarketing campaign, rubbish in – rubbish out. If you put rubbish data into a campaign, you’ll get rubbish results. Make sure that you have kept an audit of changes, not just for regulatory purposes, but to ensure that anyone who has made bad data inputs can be informed and helped to make correct data inputs in the future.

Prioritising data

Firstly, ensure you’re not contacting people who don’t want to be contacted. Some may be on the CTPS (telephone preference service) – and they should automatically be excluded. But equally, you may have called someone 3 months ago who doesn’t want to be contacted until 6 months later. Respect that – and find a way of ensuring they never slip into your campaigns until then.

That could be through a data field which you can filter, for example.

By ensuring that this field is populated at all times, you will be able to pull out the data that is “ready to call” first and foremost. However, it may also be worth doing some other prioritisation:

- Who are your key prospects?
- Which industries are you particularly strong in?
- Are you targeting a competitor weakness? If so – do you know who their customers are?

Equally, you may want to prioritise who you talk to within an organisation. You obviously want to talk to a decision-maker and convince them to make an appointment with you, but consider also who are the influencers and gatekeepers within the business. If you find it difficult to obtain a meeting with the decision-maker, it will help if you already have relationships with these people who can help.
The telemarketing campaign – messaging

Why use a script?

✓ Test modifications to the script & assess how people react – i.e. it’s measurable.
✓ Key messages are always put across.
✓ Pinpoint messages that aren’t working: if you are consistently being stopped in the same place, you can assess your messaging & adapt quickly.
✓ Be consistent – if you go unscripted, every call is different.
✓ If you are operating in a regulated environment, e.g. insurance, you may need to demonstrate what has been said on the call. A script gives you that evidence.

Before going scripted, ensure that you’re working with a telemarketing organisation or an internal resource who a) understands the market and b) has a solid business background. It’s important that the person who is making the calls and representing you as a business comes across as professional, and more than that, is able to divert from the script when necessary.

Indeed, consider the person making your calling to be just as important as the script you’re writing.

Secondly, think about your prospects. What keeps them up at night? What’s happening in their industry that your services or products might be able to assist them with? Your messaging should revolve around them – not yourself – and establishing an understanding of their key pain points will ensure that the messaging about yourself is received better.

The anatomy of a good telemarketing script

When writing your telemarketing script, try to follow this simple layout:

■ Introduce yourself
  It’s quite simple, really – say who you are and who you’re calling from

■ Establish credibility
  It’s important that early on, you establish how credible you are as a business. These are your “claims to fame”, and they could be the clients you work with, the size of the organisation, etc. Nobody ever got fired for buying IBM.

■ Establish understanding of prospect’s pain points
  Get yourself ‘onside’ by showing that you have understood the marketplace. Too many telemarketers start talking about their own company, and don’t focus on problems faced by their prospect.

■ Establish how you’ve helped similar customers with similar problems
  Again, it’s not about you – how have other clients benefited from working with you? Cold, hard statistics work best here.

■ Call to action
  At this point, it’s time to close the call and suggest an appointment.
Naturally, there will be questions and deviations from the script – this is the skill of a telemarketer to be able to answer those questions, revert back to script, and close the call to get your appointment.

Telemarketing secret... ssshhhh!!

Don’t have a list of rebuttals to work from – this is not good practice. If you have a list of rebuttals, you already know how people are going to react to your messaging.

Therefore, work this into your script so that they can’t make a rebuttal.

For example, if you are constantly met with prospects saying “we’re very busy at this time of year”, build this into your script – in the call to action, you might want to say:

“Obviously, we know that you’re extremely busy at this time of year, so we’d like just 30 minutes of your time…”

Get in there first, and ensure that your script is designed to stop the negatives before they happen.
The call

Consider these statistics:

You could make 100 “dials” in a single day

You would talk to 10 decision-makers

You would convert 1 to an appointment

These are quite standard metrics – and they can be tweaked either way by three key factors:

- Quality of data (better data = more conversations with decision-makers).
- Quality of messaging (better message = more conversions to appointments).
- Skill of the telemarketer (getting past gatekeepers, making good appointments).

We’ve looked at quality of data and how you can ensure your data is clean & relevant. We’ve also looked at quality of messaging and how you can create a great script.

Let’s look at the skill of telemarketing.

“enjoy the challenge”
How do you get past gatekeepers?

If your data is your own – and it is clean – then you shouldn't have to deal with too many gatekeepers. However, if you have bought your data in from an external source, you may have resistance to telemarketers built into the organisation. There may also be “call fatigue” – where someone has received so many calls that they don’t want to listen to your message, no matter how compelling or relevant it is.

Tips

✓ Use your contact’s first name – it shows you know the contact already.
✓ If asked what the call is regarding, mention that it is regarding a document you sent over (and if you have warmed the prospect up beforehand, this is true).
✓ If still facing resistance, ask to leave a message & call back at the same time the next day. Persistence often pays!
✓ Remember, at all times, stay cheery – never let your frustration show, and you should even build up a good relationship with the gatekeeper. Make them laugh.
✓ Ask for their help – say, for example, “I know he probably doesn’t take calls, but when is the best time to get hold of him?” – gatekeepers appreciate you acknowledging that you know your contact is important.
✓ Ask a question they can’t answer – if you ask a question above the gatekeeper’s pay grade, it’s likely they’ll escalate, helping you get through. Intrigue them!

Gatekeepers are just trying to protect their colleagues or line managers from “sales calls” – so don’t get frustrated at them, work with them! Cajole them, intrigue them, and you’ll get through.

How do you handle negativity and hostility?

Telemarketers need to have the following characteristics:

■ A thick skin.
■ Optimistic.

Some people just don’t want to be disturbed – and some people even take pleasure in telling telemarketers where to go. It’s just part of life, and a telemarketer has to accept that some people won’t appreciate being called.

Just remember the metrics mentioned above – 10% of your calls should lead to a conversation, and 10% of them should lead to an appointment. That means that 99% of your dials will not end up with an appointment, and 90% won’t even lead to a conversation.

You can probably come up with metrics as to the percentage of hostile call recipients. That way, you can tell yourself that today, you will have maybe 3 people slamming the phone down on you.
Then, you can start to focus on the positive metrics.

Negativity is slightly different. This is where you have to turn around someone who has either a negative or worse, an entrenched position about either your company or your services in general. They may already have decided they don’t want to work with you, or they may have decided that they’re not going to ever use your type of service.

However, they’re still on the phone…

A good telemarketer will see this as a challenge – an opportunity to turn a negative into a positive – and these can often prove to be the best appointments.

**Remember:**
- Not everyone wants to receive a telemarketing call. That’s fine.
- Focus on the positive metrics – 1% of dials will convert to an appointment.
- Enjoy the challenge – you can convert negatives into positives!

**After the call**

Once the handset has been placed down, what happens next?

1. Let’s transfer notes to data.

2. If the call has resulted in an appointment, then a strict process has to be followed to ensure that the appointment a) takes place, and b) is successful.


4. The appointment has to be escalated quickly to the appropriate person (i.e. the sales representative who will be attending the meeting).

5. Comprehensive details of the call have to be given to that person – all company background information, current situation, the call recipient’s reactions, etc. – have to be documented.

6. The sales representative has to make contact with the appointee within 48 hours, preferably within 24 hours. This ensures that when the sales rep makes contact, the appointee is expecting the call and has not forgotten the telemarketing call. Any later than 48 hours, and there is a risk that the call may have been forgotten.

7. If there is a long gap between call and appointment (e.g. 6 weeks), it is a good idea to ‘nurture’ the appointment with at least one e-mail.

8. The sales representative should re-confirm with the appointee a day before the appointment.
The post-call process is crucial – if an appointment has been made, it is often because it has been ‘negotiated’ – in other words, the telemarketer has convinced one of your prospects that they need to meet you. There are very few occurrences of a telemarketing call where someone says “yes, I desperately need your service” – telemarketing appointments are unique because they have been ‘achieved’.

For that reason, you need to ensure that they definitely take place and don’t ‘drop out’.

**Post-campaign**

After your telemarketing campaign, you should be able to separate out the ‘performance metrics’ from the ‘pipeline metrics’.

**Performance Metrics**
- Calls to Conversation Ratio.
- Conversation to Appointment Ratio.

**Pipeline Metrics**
- Appointments.
- Potential appointments – follow-up.
- Potential appointments in 6 months.
- Call back in 1 year.
- Not interested.

You may have different Pipeline metrics, but it’s good to be able to classify the portion of your data who did not make an appointment. That data would have to be labelled appropriately within your CRM system.

There may be businesses who are not interested at the moment, but may be starting to short-list providers or suppliers 6 or 12 months down the line. That needs to be categorised.

And then there are those who simply aren’t interested – or never will be. However, the decision-maker may leave – so don’t completely ignore this data, touch base again a year later because things might have changed.

**Naturally, you’ll also have some data to clean – you will probably find:**
- Some companies don’t exist anymore.
- Some companies have merged, acquired or been acquired.
- People change jobs quite a lot – there may be new people to add into your CRM.
- Some of your data may have included customers or competitors.
- Some company names may have been wrong.
- Some job roles may have been wrong.
There is a huge opportunity to fix your data here – **if you have entered into a campaign with 300 different organisations that you wanted to talk to, you will probably have 10 appointments, and 290 items of data to fix!**

**Telemarketing secret... ssshhh!!**

**Decide what you want to know before the campaign starts** – not afterwards. You can trawl through the long-hand notes afterwards, but you’ll need some pretty good text analysis software to be able to pull out trends, unless you want to put in the graft.
The top 10 tips for a successful B2B telemarketing campaign

1. Use your own data.
2. Clean your data at least every 6 months.
3. Refine your targeting – job roles, industry, etc.
4. Understand your market – pain points, changes, pressures, etc.
5. Target your messaging – it’s about them, and how you can help.
6. Charm gatekeepers, they’ll get you through eventually.
7. Ignore those who slam the phone down, they’re in the minority.
8. Follow-up on appointments quickly, preferably within 24 hours.
9. Create a telemarketing pipeline with dates people need to be called.
10. If using an external agency, ensure all records are updated & data is refreshed post-campaign.

Bonus tip:

Try this!

When someone says they’re not interested right now but would take a call in 6 months time.

“If I call you at exactly 11am on 25th August, will you agree to meet with us?”

Then, make a note to call at exactly that time on that date, and when you do call, they will be so impressed that you’ve kept to your word, you’ll more than likely close an appointment!
We have used Integrity BC for a number of years, and continue to achieve success in building relations with new clients. The work IBC have conducted on our behalf has resulted in a very promising pipeline, and subsequently, a very busy office.

JUSTIN MACRAE, MANAGING DIRECTOR, INTERNATIONAL TRADE SERVICES.