

Pre-call Checklist:

- Prepare your prospecting list.**
Collect contact numbers, build the list using a lead generation tool & upload it into your CRM.
- Segment & review your list.**
Segment prospects based on filters like role, geography etc. Check if the numbers are up-to-date & aren't part of any Do Not Call registry.
- Do your pre-call research.**
Spend 5 minutes to find out 5 insights about your prospect & their company like headcount growth, tech stack, pain points etc.
- Find the best time to cold call.**
As per research, the best time is usually between 4 pm and 5 pm or between 11 am and 12 pm.
- Review your cold calling script.**
Ensure your script has a strong opener, reason for your call, qualifying questions & next steps.
- Get in the calling groove.**
Overcome pre-call jitters with a routine of your choice, like listening to music for 10 minutes.

On-the-call checklist:

- Have a strong opening line.**
Your cold call opener should pique your prospect's curiosity & make them engage in a conversation with you.
- Ask open-ended questions.**
Open-ended questions encourage prospects to share detailed responses, allowing you to uncover valuable information.
- Work on your cold call pitch.**
Your pitch must have 3 aspects: personalization, pain point + value proposition & engagement questions.
- Handle different sales objections.**
By handling objections with the right responses, you'll boost your prospect's confidence in your solution.
- Move prospects to the next step.**
For high-intent prospects, the next step would be booking a meeting. For those with low intent, add them to an email nurture sequence.

Post-Call Checklist:

- Update your cold call tracking sheet.**
This sheet records all essential info from each call, allowing you to keep track of all your calling activities.
- Plan your follow-up.**
Strategize your follow-up steps based on how your call went. Consistent cold call follow-ups are crucial to get the meeting booked.
- Analyze your cold call.**
Review factors such as your tone of voice, speaking pace & objection handling to improve your next cold call.