Start Every Sales Call With an Agenda

THE BIG IDEA

Skip the small talk and open with a short, clear plan for the call. When the customer knows they can walk away, their guard drops, and they tell you what is really wrong.

Part 1: The 4-part opening

Say it in under a minute, before anything else.

01 **"I want to understand your situation."**
Tell them the call starts with you listening to what is going on right now.

02 **"If I can't help, I'll point you to someone who can."**
You are not trying to win every job. Saying so up front builds trust.

03 **"If we can help, I'll show you how."**
Only then do you explain what you do. The explaining comes after you understand the problem.

04 **"Either way, you have us for the future."**
Even if now is not the time, they know who to call when they are ready.

Part 2: How to deliver it

The opening only works if it stays light.

01 **Skip the small talk.**
"Where are you from, how are you doing" wastes the open. Be friendly, but get to the point.

02 **Sell the exit.**
They do not have to buy, do, or sign anything on this call. With the pressure gone, they share their pains and problems.

03 **Keep it short, simple, and certain.**
Don't get cute or talk too long. A confident, steady tone matters as much as the words.

04 **Ask first. Don't pitch yet.**
Stay in the questions, like a doctor asking where it hurts. Skip the success stories until you know you can help.

05 **Be honest that you may not be the fit.**
"I don't know if I can help yet." Prescribe only after you know, and only if you can.

> "You have to kill sales resistance when you start the call."
>
> The Sales Scientist

DO THIS WEEK

- ☐ Write your 4-part opening in your own words, in 4 short sentences.
- ☐ Say it out loud once, then use it on your next sales call or estimate visit.
- ☐ Have your team use it too, and swap the small talk for your first question.

Ask before every call: Did I say the agenda before I said anything else?