

TIPS FOR CONDUCTING OUTCALLS



Did you ever think of this?

Think of the outcall as an informal backyard conversation in which you want to find out how much your neighbour paid for his new deck but cannot come out and ask. How would you approach this situation?

You become the detective and utilize your questioning listening, and observation techniques!

1. Prepare:

- Review available information (e.g.- reference, online, etc...)
- Become comfortable with vocabulary (e.g.- the products, the players)
- Plan out objectives for the outcall (e.g.- what information is needed, why is it needed, how the information will be used, etc..)

2. Question:

- Prepare a list of questions before hand that must be answered (script), less than 10 questions are recommended.
- Prioritize these questions.
- Develop and practice open-ended questions

3. Listen:

- Use your active listening techniques.
- Tune out other matters and distractions from your thoughts
- Be genuinely interested in talking and listening to the other person.
- Not the forum to introduce how - smart you are, how much money you make, etc...

4. Look:

- Survey the premises, in what condition is it in?
- Look for plaques on the walls- are there any partnerships?
- Look at the staff- do they look happy?
- Go in with objectives in mind but don't let your focus blind you to unexpected opportunities that present themselves. Be alert.

5. Introduce:

- The value and role of the TCS in facilitating business
- Investment Opportunities
- S & T Opportunities