Pre-Sales Templates for Incoming Leads

If you're about to hop on an inbound sales call, you must be prepared to make a quick pitch about your organization.

These calls need to be handled much differently than a regular sales call.

In fact, the purpose of your call is to connect with inbound leads and SUPPORT them throughout the sales process. To make this happen, you'll have to build rapport and understand what they need support with.

Give leads the human option
People buy from people.

Instead of a voicemail or an IVR system, let your customers talk to someone. When you show that you care, when your lead feels listened to, the sale takes care of itself.

Answers call:

Sales Executive (SE): Hi, thank you for calling {company name}, this is {your name}. How may I help you?

Or

Hi, my name is {your name} and I am calling from {company name}. We have received your enquiry from {source}. Is this a good time to speak?

Use Case: If the Customer denies approaching {comopany name} through calls or campaigns

Customer: Sorry, I haven't filled any form on Google or called for Enquiry.

Sales Executive (SE): Ok. We have received this lead/ enquiry from your company. It may be possible that someone else from your team has shown interest in our offering and has enquired about our product. If you have a few minutes to spare, I would like to discuss our product offering, {product offering}, that would be beneficial to your sales team/ organization.

If the customer agrees, {Go ahead with the discussion}

If the customer doesn’t agree, ask for a suitable time to have the discussion.

Answering a call from the new lead:

Sales Executive (SE): Hi, thank you for calling {your company}, this is {your name}. How may I help you?

Or

Hi, my name is {your name} and I am calling from {company}. We have received your enquiry from {source}. Is this a good time to speak?

Use Case: If the Customer denies approaching {your company} through calls or campaigns

Customer: Sorry, I haven't filled any form on Google or called for Enquiry.

Sales Executive (SE): Ok. We have received this lead/ enquiry from your company. It may be possible that someone else from your team has shown interest in our offering and has enquired about our product. If you have few minutes to spare, I would like to discuss how our product offering would be beneficial to your sales team/ organization.

If customer agrees, {Go ahead with the discussion}
If customer doesn’t agree, ask for a suitable time to have the discussion.

Pre-Sales Makes call:

Sales Executive (SE): Hi, this is {your name} calling from {your company}. I received a call from this number. How may I help you?

Customer: [Presumable along the lines of - I received your email/ WhatsApp/ SMS about the new product, and I'll like to know more.]

SE: I'm glad to hear that! Can you please answer a few quick questions for me, and I'll then go into the details about {your company}

Customer [Agrees]

SE:

- Is your phone number the one you're calling me from?
- Thank you {name}, can you also please share your organization name and industry?
- Can you tell me the approximate number of employees in your organization?
- Also, how many members do you have in your sales team?
- I understand you are interested in knowing more about our {the product your company sells} platform. So I would like to know if you are using {your product} currently or have used {your product} before?
- Great! So what purpose are you looking to fulfil with a {product} platform? Customer: [answers questions]

SE: Thank you. Let me tell you a little bit about {company}. Explain more.

How would you like to proceed {name}?

Scenario 1: Customer: [Agrees to demo]

SE: Okay great! I'll send you a demo link and a calendar invite for the same, and one of my colleagues will give you the demo. Can you please tell me what date and time would be convenient for you?

Customer: [Shares availability]

SE: All right, I've made a note of this and you'll receive a confirmation email soon.
Is there anything else I could do for you?

Customer: {Yes/No]

SE: {After addressing any questions] Thank you for your time and reaching out to {company name}, {name}. We'll be in touch for the demo on the decided time.

Have a great day ahead!

Scenario 2: Customer [Agrees to free trial]

SE: Great! I’ll be sharing your details with our Customer Success Team –to help you create an account and get started. You should hear from them in the next 24 hours.

Is there anything else I could do for you?

Customer: {Yes/No]

SE: {After addressing any questions]

Thank you for your time and your interest in {company name}, {name}. We’ll be in touch to set up your trial.

Have a great day ahead!

Scenario 3: Customer [Does not agree to demo/trial]

All right! Not a problem {name}. If you do change your mind, feel free to reach out to us at any time – you can also just sign up for the {product} or a demo on our website and one of my colleagues will set it up for you.

For now, what I'll do is email you some more details about {product}, along with a video that should help you understand the product in depth. If you have any questions after that, please don't hesitate to reach out!

Is there anything else I can help you with today?

Customer: {Yes/No]

SE: {After addressing any questions]
Thank you for your time and your interest in {company name}, {name}. I hope we can take this forward in the near future.

Have a great day ahead!

Supercharge your Sales team with Kylas!

Schedule a Demo