

# CREATING SALES OPPORTUNITIES & COLD CALLING APPOINTMENTS

## DETAILS

- **ESTIMATED TIME:** 45-60 Minutes
- **DELIVERY MODE:** Trainer-Led Instruction + Structured Practice + Scenario-Based Role-Playing
- **FACILITATOR:** General Manager or Designated Individual

## VTM MATERIALS

- Trainier Activity Guide
- Worksheet: Cold Calling
- Cold Call Scenario Prompts (in this guide)

## TRAINER'S ACTIONS & CHECKLIST

- Introduce the importance of consistent prospecting and how sales opportunities are created.
- Lead a discussion reviewing Massey's primary lead sources:
- Review the 4+1 Prospecting Approach and discuss how one lead can expand into additional outreach opportunities.
- Transition into cold calling and explain the structure of an effective first contact.
- Run the Cold Call Scenario Practice, ensuring each team member practices at least two scenarios when possible.

## FEEDBACK, VERIFYING, & ASSESSING

- **Trainer Review:** Evaluate how well team members introduce themselves and establish relevance, communicate value clearly, engage "customers" in conversation, respond to hesitations or objections, and move the conversation to scheduling and appointment.
- **Group Reflection:** Encourage team members to share insights using prompts such as:
  - ▶ *Which approach helped the conversation feel most natural?*
  - ▶ *What part of the conversation was easiest to deliver?*
  - ▶ *What part would you improve next time?*

## ACTIVITY WRAP-UP

### Review the following:

- Trainer notes and observations
- Strong examples of effective introductions or conversations
- Areas where adjustments improved engagement

### Team Member Reflection — Ask:

- What is one key takeaway from today's activity?*
- Which part of initiating conversations do you feel most confident in?*
- What is one area you want to improve?*

★ **Every Lead Is an Opportunity:** Reinforce that a single lead should generate multiple prospecting opportunities.

★ **Consistency Matters:** Consistent daily outreach leads to stronger pipelines and more appointments.

★ **Confidence Builds Through Practice:** Cold calls improve through repetition and reflection.

## Getting Started & What To Do

### General Notes:

- This activity follows a three-part progression:
  1. Discussion: Creating Sales Opportunities and the 4+1 Prospecting Approach
  2. Cold Call Structure Practice: Understanding how to open and guide a conversation
  3. Scenario Practice: Applying cold calling skills in real situations
- Allow enough time for the group to complete:
  - ▶ The discussion on prospecting and lead sources
  - ▶ The cold call structure discussion and examples
  - ▶ At least two scenario practices per team member when possible
- Rotate participation so team members practice:
  - ▶ Initiating the conversation (Sales Inspector role)
  - ▶ Responding as the customer when appropriate
  - ▶ Providing observations or feedback

### During the Activity:

- Observe whether team members:
  - ▶ Clearly introduce themselves and the purpose of the conversation
  - ▶ Communicate value in a way that is relevant to the customer
  - ▶ Ask engaging questions that encourage discussion
  - ▶ Respond calmly and professionally to hesitation or objections
  - ▶ Move the conversation toward scheduling an appointment
- Listen for opportunities to highlight effective phrasing and conversational flow..
- Encourage team members to reflect on their wording and tone before group discussion.

### After Each Practice Block:

- Ask quick reflection questions:
  - ▶ *What helped open the conversation?*
  - ▶ *What caused the conversation to stall?*
  - ▶ *How could the opening or value statement be improved?*
- Reinforce strong examples and common patterns.

## Step-by-Step Delivery

### Step 1: Lead the Discussion — “Creating Sales Opportunities”

Time: 5–7 minutes

Purpose: Build awareness of how consistent prospecting creates sales opportunities.

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### Lead a discussion covering Massey’s common lead sources:

- Office leads

- Web leads
- Service leads
- New construction leads
- Creative prospecting (door knocking, door hangers, community engagement)

Prompt discussion with questions such as:

- *Which of these lead sources do you encounter most often?*
- *Which lead sources generate the most opportunities?*
- *How can one lead turn into multiple prospects?*

Introduce or review the **4+1 Prospecting Approach**.

Explain that the goal of this approach is to **expand a single lead into additional outreach opportunities**.

**Trainer Prompt:** *“Think about the last lead you worked. What additional opportunities could have come from that single lead?”*

## Step 2: Worksheet Activity — Drafting a Cold Call Script

**Time:** 10–12 minutes

**Purpose:** Reinforce the structure of an effective cold call and allow team members to practice organizing their approach before scenario practice.

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Explain that while cold calls should sound natural and conversational, a clear structure helps keep the conversation focused and effective.

Review the core components of a structured cold call and have the team members follow along on their worksheet.

- **Opening Statement**  
Capture attention quickly and introduce yourself clearly.
- **Value Proposition**  
Explain why the conversation is relevant or beneficial to the customer.
- **Engagement Question**  
Invite discussion and learn more about the customer’s needs.
- **Handling Objections**  
Respond calmly to hesitation or concerns.
- **Closing the Call**  
Confirm the next step, such as scheduling an inspection or appointment.

**Trainer Tip:** Consider sharing your own cold call example.

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## Script Draft Exercise

Ask team members to draft a short cold call outline using the structure above.

They should choose one of the following lead types:

- **Web Lead** — A homeowner requested information but has not scheduled an appointment

- Referral Lead — A neighbor was referred by an existing customer
- Neighborhood Outreach (+1) — You completed an inspection and are reaching out to nearby homeowners

Team members should outline their conversation using the following structure:

- Opening Statement
- Value Proposition
- Engagement Question
- Handling Objections
- Closing the Call

Encourage them to focus on clear language and conversational tone, rather than memorizing exact wording.

### Script Review Discussion

After team members draft their outline, call on team members to read their opening statement and engagement question aloud. Discuss as a group:

- Does the introduction clearly explain the purpose of the conversation?
- Does the value statement make the call relevant to the customer?
- Does the engagement question invite discussion?

Provide coaching where needed to improve:

- Clarity
- Natural phrasing
- Confidence in delivery

Reinforce that the goal is a natural conversation supported by a clear structure.

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### Trainer Transition to Scenario Practice

Before moving to the role-play scenarios, remind team members that cold calling **improves through practice, adjustment, and repetition.**

Encourage team members to use **elements from the script they drafted in Step 2** during the upcoming scenarios.

Explain that after each scenario they will complete a **brief self-assessment using the notes section provided on the handout.**

These notes help team members identify:

- What worked well during the conversation
- Feedback provided by the trainer or peers
- One adjustment they will apply in the next scenario

Remind team members that the goal is progressive improvement from one attempt to the next.

**Discuss common challenges such as:**

- Sounding overly scripted
- Moving too quickly into selling
- Not clearly explaining the purpose of the call

Trainer Prompt: *“Which part of a cold call feels most natural for you? Which part is the most challenging?”*

### Step 3: Scenario Practice — Cold Call Conversations

Time: 20–25 minutes

**Purpose:** Practice initiating conversations and setting appointments using realistic scenarios while refining delivery through feedback and self-reflection.

#### Instructions

- Read the scenario setup aloud.
- Allow the team member to respond naturally.
- Observe how the conversation develops.
- Provide feedback and discuss improvements before moving to the next scenario.

**If multiple team members are present, they may pair up and practice delivering their cold call to each other before presenting to the group.**

Peer partners should:

- Take turns delivering their cold call
- Respond as the customer
- Provide brief feedback on clarity, tone, and engagement

After each scenario:

- The team member completes their self-assessment notes.
- The trainer and/or peers provide feedback.
- The team member identifies one adjustment to apply in the next role-play.

Encourage team members to focus on:

- Confidence in their introduction
  - Clear explanation of purpose
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- Engaging the customer in conversation
  - Moving toward scheduling an appointment

#### Scenario 1 — Neighbor Introduction

**Setup:** You have just completed a termite inspection at a nearby property. You approach a neighboring homeowner and offer a complimentary inspection.

Trainer Discussion Points:

- Was the introduction clear and confident?
- Did the team member explain why they were reaching out?
- Did the conversation move toward scheduling an appointment?

#### Scenario 2 — Web Lead Follow-Up

**Setup:** A homeowner submitted an online request for a lawn care analysis but has not scheduled an appointment.

Trainer Discussion Points:

- Did the team member reference the customer's request?
- Was the value of scheduling the analysis explained clearly?
- How effectively were hesitations handled?

### Scenario 3 — Everyday Interaction

**Setup:** Someone notices your Massey uniform while you are out running errands and asks about your job.

Trainer Discussion Points:

- ▶ Did the conversation feel natural and conversational?
- ▶ How did the team member introduce Massey services?
- ▶ Did they create an opportunity to offer an inspection or service?

### Final Reflection Discussion

Ask team members:

- What part of initiating conversations felt strongest today?
- What is one adjustment you would make in your next cold call?
- What is one takeaway you will apply in your daily prospecting?

Reinforce that consistent outreach and confident conversations are key drivers of sales success.

## Cold Call Structure & Best Practices

A well-structured cold call increases engagement and improves your chances of setting an appointment. Use this framework to guide your approach:

1. Opening Statement – Capture attention quickly.
  - Example: *Good morning, Ms. White. My name is [Your Name] with Massey Services. I was just at your neighbor's home discussing a [pest/lawn issue], and I wanted to offer you a complimentary inspection.*
2. Value Proposition – Explain why the call is relevant.
  - Example: *Many homeowners in your area have noticed similar issues, and I'd love to provide you with a professional assessment at no cost.*
3. Engagement Question – Invite discussion.
  - Example: *Have you noticed any [common problem] around your home or yard?*
4. Handling Objections – Address concerns calmly.
  - Common Objection: *I'm not interested right now.*
  - Response: *I completely understand! Our inspections are complimentary and informative—would you be open to a quick check-up while I'm in the area?*
5. Closing the Call – Confirm the next step.
  - Example: *Would Tuesday or Wednesday after 3:00 PM work better for your schedule?*

## Structuring My Own Cold Call Script

Using the cold call structure, draft your own call script for one of the following lead types:

- **Web Lead:** A homeowner who inquired about lawn care services but hasn't scheduled an appointment.
- **Referral Lead:** A neighbor was referred by an existing customer who received pest control service.
- **Neighborhood Outreach (+1):** You completed an inspection and are now reaching out to nearby homeowners.

## My Cold Call Script:

- Opening Statement:
  
- Value Proposition:
  
- Engagement Question:
  
- Handling Objections:
  
- Closing the Call:

## Scenario 1

What went well?	Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

## Scenario 2

What went well?	Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?

## Scenario 3

What went well?	Feedback	Areas to Improve
Write down what you think went well while your trainer finishes their notes.	What feedback did your trainer give you?	What are you going to try in the next role-play to improve the areas your trainer pointed out need some work?