



## **CONTACT PLANNING**

## **PEAK**

## **PERFORMER**

## **PROSPECTING**

***“Whatever it was that got you here, is not enough to keep you here!”***

***Professor Albus Dumbledore  
Headmaster  
Hogwarts School of Witchcraft and Wizardry***

***Tom Pasha  
Contact Planning***

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Tom Pasha, Contact Planning; 3186 Whisper Wind Dr. St. Cloud, FL 34771  
Tel: 407-891-2252; Fax: 407-891-6428;***

## **Prospecting Works Because it Overrides Market Forces**

**--SUPPLY AND DEMAND: PROSPECTING STEALS BUSINESS AND DEVELOPS NEW MARKETS.**

**--GROWTH/ DECLINING CURVES: GROWTH CURVES ARE A SERIES OF STEPS; DECLINING CURVES ACCELERATE!**

**--SALES RULE OF 80-20: 80% OF YOUR SALES WILL COME FROM 20% OF YOUR CLIENTS-- PROSPECTING BREEDS LOYALTY FROM NEW AND CURRENT ACCOUNTS--- YOU WON'T GET BUSINESS STOLEN, AND YOU'LL MAXIMIZE BUSINESS FROM YOUR CURRENT ACCOUNTS.**

**--WORKING WITH STANDARD DEVIATION CURVES:**

**--FOCUSED PROSPECTING TARGETS THE AREAS THAT ARE MOST LIKELY TO BRING RESULTS--THE 60% "ON tHE BUBBLE" AND THE 20% THAT ARE "SOLD"**

**--NOT A SHOTGUN, BUT A SHARPSHOOTER APPROACH**

**--SALES WORKS IN 3 CYCLES: PROSPECTING, QUALIFYING, CLOSING:**

**--PROSPECTING FILLS THE FUNNEL WITH NEW ACCOUNTS AND NEW BUSINESS FROM CURRENT ACCOUNTS.**

**--QUALIFYING MOVES THE CLIENT THRU THE FUNNEL, AND DEVELOPS NEW ACTIVITY INTEREST WITHIN THE WORKING ACCOUNT.**

**--CLOSING BRINGS THE BUSINESS IN, AND ALLOWS FOR A REFERRAL FOR FUTURE OR RELATED BUSINESS--- WAYGIFY.**

**THE BEST MANAGERS ARE ACTUALLY PROSPECTING THROUGH ALL STAGES OF THE SALES CYCLE!**

## **DEFINING THE TERMS OF PROSPECTING**

**SUSPECTS:** *These are the endless client lists, unopened files, long-dead accounts, past business, lost business, or any source of groups to contact. They may have been contacted at some point, but they have never been fully explored as a potential customer.*

**PROSPECTS:** *These accounts have been called in the past, and have shown some interest in working with your hotel. Based on their preliminary interest and meeting specifications, their profile matches the profile of the ideal group, and they have shown an interest in booking within the next 6 months.*

**CONTACTS:** *After some preliminary calls, this group shows interest, received and reviewed information, possibly secured tentative dates, and referred business to you. With continued attention, they should book within 3 months.*

**CUSTOMERS:** *Far and away the best group--- they have either booked or committed to book your hotel, they refer business to you, and enjoy working with you on a personal and professional level. When a Suspect reaches this stage, you should expect them to book within 30 days, and they are a regular part of your customer service calls after their event.*

*Like most businesses, we can expect some breakage--- not every Prospect will get to the bottom of the funnel and become a Customer.*

*In fact, since Customers typically make up only 20% of your market (Remember that 80% of our business is booked by 20% of our customers) plan on contacting 100 Suspects for each group of 20 Customers.*

*While it sounds like a lot of calls, when you complete just 5 sales and follow-up calls a day, you'll have 250 new accounts in 1 year!*

## **THE SALES CALL**

***Years ago, it was fashionable to tell sales people to get "Psyched Up" for a sales call--- catch and kill the account, don't take NO for an answer, and push the client into buying something, ANYTHING! After several years of burning out salespeople and scaring away perfectly good accounts, it's time to change how we approach our customers.***

***When we Prospect, we want to start a long-term relationship with clients, so we want to make a good impression, the same as in any social situation. When you first meet someone in person, do you interview them? Tell them everything about yourself? Tell them how you're better than everyone else?***

***Of course not, but that's how most of us come across when we Prospect!***

***Like making a good first impression, clients deal with people they like, or who, on a sales call, at least sound likeable! The key to make that happen is to RELAX!***

***...Enjoy the client, and the conversation, slow down, and let the client do the talking. While learning new prospecting techniques, it's important to use the style and strategy tips, but when you learn to relax, you and your new client will get the relationship off to a great start!***

***In this section, we'll cover the following:***

- Calling Strategy***
- Calling Style***
- The Call Script***
- Gatekeeper / Voice-mail Magic***

## **CALLING STRATEGY:**

***As with most skills, there are techniques that you should use to make the most out of your calling:***

***---CALL-COUNT: It's better to make 20, 2-minute calls than 2, 20-minute calls--- keep moving, and remember the one who makes the most calls wins!***

***---GO TO MAUI!!: The most important strategy is to get on the phone, working for quality time with no interruptions! Set aside 2 hours of uninterrupted time to look for new business-- Get a "Do Not Disturb" sign from Housekeeping, hang it on your office door, and make yourself invisible!***

***---LIST MANAGEMENT: Have 2 or 3 lists working at the same time; if you were looking for gold in a mountain, you wouldn't tunnel through the middle of it-- you'd check several spots until you find the biggest gold vein. If one list isn't paying off, move onto another!***

***---"COLD" LISTS: Another advantage of having 2 or 3 lists going: if one market or list goes suddenly "cold"--- and it does happen--- changing to a new list can change your luck, first by moving to more receptive clients, and by not harassing a "cold" list. Called later, a "cold" list will heat up nicely!***

***---CALL THE END OF THE LIST FIRST: When you start a call list, WORK FROM THE BACK TO THE FRONT of the list--- if the list had ever been called by another manager, it was probably started from the front, and the manager probably never made it to the end!***

***---WORK ON YOUR POSTURE: Not the way you sit, but the way you come across to the client! Position yourself--- Don't come across as too anxious or aggressive; your posture should be that you are offering a superior product or service to the client, and hope they can take advantage of it.***

***Let them know you want their business, but you don't need their business!***

## **CALLING STYLE :**

**--- RELAX!**

**--- SMILE WHEN YOU TALK---PEOPLE REALLY CAN HEAR A SMILE!**

**--- IT'S A CONVERSATION---LET THE CLIENT DO THE TALKING!**

**--- LISTEN TO THE CLIENT---WIIFM'S ARE IMPORTANT**

**--- MIRROR THE CLIENT'S TONE AND SPEED**

**--- ASK QUESTIONS---THE PERSON ASKING THE QUESTIONS DIRECTS THE CONVERSATION!**

**--- DON'T GET CAUGHT SELLING!**

**--- ENTHUSIASM BEATS TECHNIQUE---WORK TO DEVELOP A WARM, FRIENDLY, PERSONAL STYLE.**

## **Call Scripting:**

***Prospecting calls have a beginning, middle and end, and while many of us like to "wing it," the best calls are made with a 30-second script. It's important to allow the client to talk, and offer "exits" at every point, so you don't sound like a telemarketer. Your scripting should include the following:***

***INTRODUCTION: Clearly say who you are and who you represent, while making sure you are talking to the right person at the client company. Get the contact's first and last name correct, and use their name throughout the conversation.***

***INVITATION: Following the introduction, this is a general invitation to see if there is an interest in your destination or hotel and in the special offer you're about to describe.***

***INTEREST: At this point, describe the promotion in detail, ask whether the client may have an interest in hearing more--- at that point, you can provide them with the information they need, or move on to another client.***

***INVESTIGATE: When you've established interest, have the client give you some particulars about the programs the client plans. Ask about their meeting's past dates, current status and future plans. Get information about the client's needs and priorities/***

***INITIATE FOLLOW-UP: Finally, when you've established interest with the correct contact, gotten some particulars on their programs, you have to initiate the Follow-up process. Offer to send them a brochure and business card, and schedule a call-back date. Have them agree to receive the materials and the follow-up date.***

***Best of all, every now and then, a client will actually have business on the first call, so be prepared to check space and generate booking information!***

## **DEVELOP A "GIFT OF GAB" : THE FIVE I'S**

### **Introduction:**

**Hello, my name is \_\_\_\_\_, from CONTACT Planning here in \_\_\_\_\_. We are a national meeting planning company and we help planners arrange the space, dates and rates for their events around the country. We're calling top accounts in the (area, industry) to introduce them to our services. Would you be the person who works on meeting plans for the company?**

**Let me get your name.... what's your position with \_\_\_\_\_? Thanks again--- my name is \_\_\_\_\_, from CONTACT Planning, here in \_\_\_\_\_....**

**Do you have a minute to hear about \_\_\_\_\_?**

### **Invitation/ Interest:**

**Great! As I said, we help our clients negotiate the logistics for their meetings. We book over 100,000 roomnights annually, and over 30,000 rounds of golf. We are volume clients for Hyatt, Hilton, Sheraton and all the major hotel companies.**

**When we do a search for you, we'll take your requirements, shop hotel availability and negotiate aggressively on your behalf. We'll deliver a clean, edited and accurate contract, that includes your booking into the volume of business we book, and you'll receive the best rates, comps, upgrades and services. There is no fee for our services—we are paid by the hotel you select. We do not accept any over-rides or retainers from any hotel company, so we work entirely on your behalf.**

**Do you think you might have an interest in seeing what we can do for you?**

### **Investigate:**

**If you have a minute, tell me about your meetings (size, dates, pattern, program, etc.) What the most important feature you look for in a hotel?**

**So, if a hotel could deliver (that feature), do you think you'd be interested? When's your next open date?**

### **Initiate Follow-up:**

**I really appreciate all your time, I don't want to interrupt your day-- I'll tell you what--- let me check the dates and send you off a kit--- and I'll follow up with you after that, when you have a chance to look it over.**



**CALL SCRIPT**

***INTRODUCTION: (Intro yourself and hotel, get name of assist. and planner)***

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***INVITATION/ INTEREST: (Invite them to hear about your hotel or special promotion)***

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***INVESTIGATE: (Find out about their meetings)***

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***INITIATE FOLLOW UP: (Offer to protect some dates, send a brochure, visit)***

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## **GATEKEEPER / VOICEMAIL MAGIC**

*Somewhere along the way, you'll encounter a Gatekeeper-- either a human being or an electronic recorder, and it's important to realize that it's their job to keep you from doing your job. This is particularly true for the the human variety, the dreaded "attack-secretary"-- their sole mission in life is to protect The Boss, and you've got three options to deal with them:*

**HANG-UP AND MOVE-ON:** *Not a good option; the Gatekeeper wins, and you may have lost a key client--- this can get very expensive!*

**POWER YOUR WAY THROUGH:** *Again, not a good option; you may get to the Boss, but you'll probably have to deal with the Gatekeeper again, and they can hold a grudge!*

**MAKE THE GATEKEEPER YOUR ALLY:** *By far, the best option! You'll keep the Gatekeeper on your side, make them part of the planning process, and can even lead to referred business-- Because they control access to the Boss, they are the Second most important person in the office-- when you work them just right, they will let you in, and keep other sales people out!*

## **Strategies to Make the Gatekeeper Your Ally:**

***---On your first call, be sure to introduce yourself and get their name and title --- give them a brief description of why you're calling. The real trick here is to use the first 3 of the Five I's! By adapting the Introduction, Invitation and Interest phrases from your script to the receptionist or assistant, you'll make them part of the process, and unlikely to turn you away!***

***When you apply the technique correctly, the assistants will actually work as Gate-Keepers, letting you in, and keeping other hotel sales people out! After the first introduction, every time you call, be sure to use their name, and reference back to the Introduction!***

***---If you get turned away twice: Ask them to help you set a time when the Boss will be available----set a time with the Gatekeeper to call back, and keep the appointment.***

***---If you get turned away three times: Ask the Gatekeeper if there's a problem, or a project that is keeping you from getting through; it's possible they are working on a project that cannot be interrupted. Try again to re-set a telephone appointment...***

***---Finally, if you've tried everything above, and you still can't get through, try calling before 8 am, or between 12 noon and 1pm, or after 5pm--- those are the best times when the Gatekeeper may leave the Boss unprotected!***

***---After all that nonsense, if you still can't get through, MOVE ON!! Consider the fact they won't talk to you as one of the "NO's" we endure on the way to the "YES's"--- there are too many clients out there to waste time chasing after only one!***

## **Voice-Mail:**

***When you're calling for new business, your top priority is to avoid VOICE-MAIL!! There are ways to work with it, but the best tactic is to avoid it in the first place...***

***Whenever you encounter it, try the following steps to get to a HUMAN!***

***--Dial "O" to return to the operator or assistant; find out if the client you're calling for is in, or if there's someone else in that office who can help you.***

***-- Re-dial, using the number prior to or following the client's number: if the client number is 555-1234, try dialing 555-1233, or 555-1235. Many times, that extension will be at the next desk, in the same department!***

***--Re-dial the last four numbers with "00". Again, if the client number is 555-1234, try 555-1200, and many times, that will get you back to PBX or the departmental switchboard.***

***--If you have a bad phone number, go on-line or call Information to see if there's a better number available. ([www.smartpages.com](http://www.smartpages.com))***

***But after all these efforts, if you can't get around it, try to make the best of it. You'll have to leave a voice-mail, but if you give the client a reason to call you, sometimes they call back with business!***

## **FUN WITH ELECTRONICS**

***Okay, the Gatekeeper can be handled, but what do you do when all you get is voicemail? Again, adapt the first 3 of the Five I's to voice-mail, and your client call-backs will improve dramatically. Read the following script into the machine, and you'll be happily surprised with your results!***

***"Hello, Mr. \_\_\_\_\_, my name is \_\_\_\_\_, with CONTACT in \_\_\_\_\_ . We are calling top accounts and offering a great meeting package. It sounds like you're busy now, but if you get a moment, please call me back at \_\_\_\_\_"***

***... If you don't get a chance to get back to me, I'll try to call again, so one way or the other, we'll get in touch...."***

***The beauty of the above message is that it sounds informal, interested, and doesn't come across too strong. It introduces you, your hotel, the package being promoted, and lets the client know you'll call back. Finally, it lets the client know that if he doesn't call you back, that he should expect a call back from you!***

***Again, Voice-Mail works best when you use the first 3 of the Five I's: Introduction, Invitation and Interest!***

***REMEMBER WIFFM'S: An excellent tactic here is to give the client an idea of the special you're promoting: mention your latest renovation, awards you've won, etc, so the client would have an interest in calling you back.***

***Again, if you've tried this three times with no response, mark it down as a NO INTEREST, and MOVE ON! You shouldn't spend any more time trying to reach someone with no interest!***

## **THE ART OF "ONE MORE QUESTION"---**

### **"The Colombo School"**

*Many times we don't ask the right questions, or don't get the right answers from the client. Like Colombo, you should use these questions during the first call, but if you don't get all the information, you can use them on an immediate follow-up call!*

*"Mr. \_\_\_\_\_ --- I just hung up the phone with you, and I started thinking about your group--- I wanted to ask you just one more question---- (Then ask your question) ...Thanks again for your time, and I'll get the information off to you."*

*With one more call to ask the client another question, you've demonstrated genuine interest, started building trust by not coming across as a fast-talking telemarketer, and re-confirmed your follow-up. Also, by calling back, you've also completed the second call needed to get a booking!*

*Since most managers have problems making the first call, the second call is almost never done, so you've identified yourself to the client as someone who sincerely wants their business.*

*All with one call!*

**GOOD "COLOMBO" QUESTIONS:**

*When you're working on a list for the first time, or using the Colombo School for a client you just called, the rest of the Tricks of the Trade give you some strategies to try! All of them work, but be sure to find the ones you like best!*

- Big Circles*
- Work the Organizational Chart*
- Follow the Money*
- Begging the Question*

**BIG CIRCLES:**

***This Trick allows you to use your local client to identify regional, state and national contacts and vice-versa. Be sure to get and use your client's name in contacting the other geographic divisions of your target group--- this makes a Cold Call into a Warm Call!***

**WORK THE ORGANIZATIONAL CHART:**

***Similar to Big Circles, you use your contact in one area of a company to locate and refer you to contacts in other divisions. Obviously, if your client does all the planning for all divisions, you might skip this step, but once you have an good relationship with your client, they are usually happy to refer you to other departments.***

***The trick here is to start as high on the chart as you can. Again, be sure to use your first contact's name to warm-up a cold call!***

**BEGGING THE QUESTION:**

*This technique is best when the customer can't (or won't) give you enough information on space, dates and rates to get a booking. Here, the technique is to get the Prospect to make a tentative commitment to a particular set of dates--- when you do this just right, the Prospect becomes a Customer, they get the dates they need, and you avoid having the dreaded "Send an Info kit" response.*

**FOLLOW THE MONEY:**

*Use this technique for Contacts and Customers who you think may be able to direct you to other planners. Basically, all you do is ask your customer who they know in another company with whom they do business. Your customer can give you the name of another contact they work with at another company; call the new contact, dropping your Customer's name, and you may have another sale underway!*



## **LIST BUILDERS--- CORPORATE MARKET**

- \*Salesman's Guide-- Corporate Accounts**
- \*Fortune 500 Listings**
- \*Local Chambers of Commerce**
- \*Dunn & Bradstreet Corporate Directory**
- \*Ad Age Magazine--- Listings of new products and campaigns = Meetings!**
- \*Prism Subscribers (formerly Adams and Adams/Laux Business):**
  - Insurance Meeting Planner**
  - Medical Meetings**
  - Pharmaceutical Meeting Planner**

## **LIST BUILDERS--- ASSOCIATION MARKET**

- \*Salesman's Guide-- Association Market**
- \*Encyclopedia of Associations**
- \*Top Local Corporate Accts--- Find out what Associations they belong to!**
- \*Local Library: Directory of Associations**
- \*Local Chapters: ASAE, CESSE, SGMP, NCBMP**

## **STARTING MONDAY....**

**\_\_\_ -- GET A "DO NOT DISTURB" SIGN**

**\_\_\_ -- GET ON THE PHONE! \_\_\_\_\_ HOURS,  
EVERYDAY!**

**\_\_\_ -- USE THE TRICKS OF THE TRADE--  
GET DANGEROUSLY GOOD!**

**\_\_\_ -- PICK A MARKET-- PICK A TARGET**

**\_\_\_ -- KEEP SCORE!**

***"The Ultimate Insanity is the notion that you will achieve different results by repeating the same actions."***

***---Albert Einstein, Famous Violinist***