

The BD Playbook Series

Part Three: Using the phone



SourceWhale x **Hector**

What to expect



Introduction.....	03
Meet the experts.....	04
The winning formula.....	05
1. Mindset	
2. Multichannel	
3. Leading with purpose	
4. Objection handling	
5. Close/asking for a meeting	
6. Practice makes perfect	
Key takeaways.....	16
Our contributors.....	17
Additional resources.....	18

Introduction

Welcome to the final part of our BD Playbook Series, where we share insights on how to incorporate a call step in your Business Development strategy.

By merging our data-driven insights with expert guidance, we've created a playbook full of practical advice and actionable takeaways. Get ready to start mastering conversations on the phone and securing more successful meetings with prospective clients.

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Throughout this series, we've provided key insights on how to build a strong outreach approach and personal brand. This final instalment pulls it together and delivers actionable advice on the most crucial conversion point - the phone - based on data and the work of those doing it daily. We know that it converts higher than any other method and hopefully the pointers in this playbook will leave you feeling more confident than ever when it comes to making that next call!



Dougie Loan
CRO at SourceWhale

SourceWhale

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You have created a system for your business development activity and you're proactively building your brand online. It's time to use your best tool as a modern-day recruiter. The phone. There is no getting around it. Recruiters who effectively utilise the phone to grow their pipeline will have a competitive advantage over those who don't, which is a lot of people in today's market. Apply the practical advice in this final playbook instalment to turn the phone into one of your most vital sales tools.



Hishem Azzouz
Founder at Hector

Hector®

Meet the experts

Everyone will bring their own unique spin to the art of cold calling. However, these experts have excelled at the game and have offered to share knowledge and insights with the sole aim of empowering others in the industry.



Martin Gutierrez
SDR Manager at
SourceWhale

SourceWhale



Nicole Plinston
Co-Founder at
This is Prime

Prime.



Ben Hobday
Co-Founder at
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AXEL



Chris Hatfield
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Sales Psyche

Sales Psyche

The winning formula for success

When looking to find success with cold calls, these six areas play a pivotal role in ensuring your conversations are streamlined, rewarding and results-driven.

1

Mindset

Stay positive despite knockbacks

2

Multichannel

Use the phone alongside LinkedIn, email and other channels

3

Leading with purpose

Build relationships and add value

4

Objection handling

Use the LAER framework to handle these effectively

5

Close/asking for a meeting

Offer alternatives and always follow up

6

Practice makes perfect

Analyse and refine your approach

1 Mindset

Embracing the word "no" is essential for success. When converting 1 in 10 phone calls, we must acknowledge that we need to hear 9 "no's" in order to achieve a "yes." View each "no" as a step forward.

Maintaining a positive mindset is crucial. It influences our tone, language, approach, enthusiasm and energy during conversations. With the wrong mindset, calling becomes a chore. With the right mindset, calling becomes a powerful tool in our arsenal.

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To build a healthy and high performing mindset towards cold calling, it's important to think about the conversation you have with yourself (your self-talk). This will influence the outcome with your prospect. Ask yourself, is this self-talk supporting me going into this cold calling? If it's along the lines of "this won't go well", "you're not good at cold calling" or "they won't want to speak to you", then this self-talk isn't beneficial. Would you accept these statements coming from your colleague or manager? Very unlikely. If you wouldn't accept it from others, don't accept it from yourself. Focus on supportive self-talk before cold calling e.g. "The more I do this, the more familiar and confident I'll become" or "At the end of two or three of these calls today is an opportunity to book a meeting". This supportive self-talk is far more effective and can play a big part in your approach and outcomes.



Chris Hatfield

Founder at Sales Psyche

2 Multichannel

Many mistake the phone's place in the process and often feel that a “one or other” approach is the key. In fact, our data shows that using the phone alone with no other touchpoints is an inefficient method for BD.

The phone should be seen as a key conversion point. If you've read [Part 1](#) and [Part 2](#) of this series, implemented a multichannel approach and worked on building your personal brand, you'll find calling to be a much warmer experience. Following up on a recent email, LinkedIn message, voice note, video message or similar can lead to better results than a direct call approach.



Only **12.4%** use a call step in their BD approach



3rd step for highest conversion rate

“

More meetings are agreed over the phone (59%) than any other method, yet it still regularly ranks as one of the lowest forms of outreach in terms of volume of times used by recruiters. So this is a great opportunity to get ahead of the competition. Warming up calls by taking a multichannel approach and working on personal brand helps to provide marginal gains on conversion rates. Every little counts!



Dougie Loan

CRO at SourceWhale

3 Leading with purpose

It's not enough to simply reach out and say, "Hey, I'm from X recruitment. Got any jobs?" Whilst those exact words may not be used, variations of this can be the default for many. A call that lacks purpose is easy to spot and will likely lead to rejection. Instead, provide a compelling reason for the call. Are we reaching out because we:

- ✓ Want to discuss an exceptional candidate
- ✓ Are trialing something new and exciting in the market
- ✓ Are releasing a whitepaper
- ✓ Have some other compelling event

Having something ready to discuss to help generate conversation is an important starting point for anyone looking to pick up the phone. Remember, it's not always about securing the meeting there and then. Leading with purpose allows you to have a credible foundation for your conversation which can lead to opportunities in the future. The opener is all about sparking interest that helps you stand out from the rest.

“

We don't go into conversation always looking to trade immediately. We are relaxed, we look to build relationships and we are confident in adding value to a conversation outside of "do you have jobs....did you like the CV". The feedback we have been getting on our approach demonstrates people enjoy talking with us. Oh and the phone is not dead, I pulled 5 jobs with a new client last week. Pick up the phone!



Ben Hobday

Co-Founder at Axel Talent

Problem-based opener

A solution-based sale is possible when using information gathered from a problem-based approach, as it can lead to further conversations that unlock the potential for a wide ranging solution once you understand the business impact, as well as opens the door to:



A meeting to discuss further



Exploring a candidate who may be a strong fit



A call back in future



Invite to an event / sharing of content relevant to the problems discussed

Example

This is just one example of a problem-based opener which can be used (and continues on the next page). The aim is to gain a deeper understanding of the organisation and it's approach.



Time and permission-based opener which says name, company and cuts to the point. Avoid "can I have 27 seconds" etc. as these cliché time-based openers are overly used in the market and unrealistic in the time it takes to have the conversation.

{{First Name}}, Hi, it's Sarah from Acme Recruitment. Appreciate we haven't spoken before, but do you have two minutes to explain why I chose to call you?

Based on recent conversations with managers hiring for **{insert role hiring for}** at **{insert competitors}** they are telling me either;

a) They don't get top candidates quickly enough which has a massive impact on daily business operations

OR

b) They are often swamped with applications and submissions, given the current market conditions, but these are time-consuming to review and often lack the quality required to fill the position



Seek to confirm if any of these match. If they do, it gives an opportunity to ask a follow-up open-ended question which digs deeper into the issue such as "How are you currently handling this?" and "What impact is that having on the team at the moment?".

Option 1

That's great - sounds like you have things tied up. Curious, what could be better for you when it comes to hiring?

Option 2

That's great - sounds like the approach you have in place is driving results. That's rare at the moment. What is your secret?



Here are a couple examples of a problem-led approach. The aim here is to outline two problems you solve and seek to understand if any of those resonate. Regardless of which problems you choose to address relevant to your clients, you should always use the language they would use to describe these issues.

Don't suppose either sound familiar or am I way off the mark?



If the answer is way off the mark you also lead with an open-ended question which has the ability to gain more information, like either of these two options. For option 2, a fun and inquisitive tone is required here and can open up into an interesting conversation if delivered correctly.

4 Objection handling

The key to objection handling is effective questioning. We're all likely to face rejection, obstacles and blockers during our conversation. In fact, these are expected! However, strong questioning techniques allow us to dig deeper into the reason behind it and determine if we can truly add value to the situation.

A common mistake can be to try to handle an objection too quickly. Instant reactions often lack the depth required to truly persuade or influence the view of the person you're speaking with. LAER is an easy framework that can be used to avoid this:



Check out [**“Never Split the Difference”**](#) if you want a masterclass on effective questioning. The principles applied in that book for negotiation can also be applied to cold calling.

“

Cold calling isn't easy and we're all reluctant to pick up the phone at some point in our careers... but the pros of cold calling definitely far outweigh the cons. You just need to master the craft of cold calling through preparation and practice. If you feel prepared, you feel confident. If you feel confident, you're able to listen with intent and listening is key to handling objections, rather than thinking about what you're going to say next. When you've got them on the phone, always remember the motto "if you don't ask, the answer is always no".



Nicole Plinston

Co-Founder at This is Prime

LAER framework example

Here is just one example of how the LAER framework can be used to handle an objection effectively. By following this method, we can set expectations for ourselves and our clients, as well as create trust to lead to better outcomes.



We've been stung by agencies in the past, so I'm not sure we'd be open to it again.

Listen and Acknowledge

Listen to the pain and empathise with the situation to instantly create trust.

I hear you, and appreciate that's likely left you with a negative impression.

Explore

Before we provide a solution, we need to know why the objection exists in the first place. Here is just a small number of example questions that you may consider asking the prospective client:

1 Talk to me, what happened?

2 What was the process?

3 Where did it fall down?

4 What impact did that have?

5 What did you do instead?

6 What would you have done differently?

Response

Demonstrate that you've listened, understood and use language that resonates with the prospective client when you respond. Clearly articulate solutions that address their concerns and end with a low-commit call to action.

It sounds like you were badly let down, that the quality of candidates you were promised never materialised and it left you having to scramble around to fill the role directly. Whilst you did fill it eventually, it sounds like you wasted a tonne of time interviewing people who weren't a fit or who dropped out, is that right?

Ok, it makes total sense that you'd be hesitant to engage a partner again as a result. However, our scorecarding approach to role qualification, candidate fit and process milestones means that we never work a brief without a clear understanding of what you're looking for.

In fact, if we couldn't help, we'd simply tell you upfront. Not only that, we also have service offerings which ensure complete commitment to the filling of your position if we do decide to take it on.



Bonus point if you secure the meeting face to face!

Close/asking for meeting

Appreciate it's a lot to take in over the phone, would it be a bad idea for us to grab 15 minutes online* this week to discuss? No hard feelings if you decide it's not worth chatting through after that. Worst case scenario, you can get some insight into how to avoid the problem again in future and how your competitors are currently running their approach. I can do Tues at 10am or Weds at 3pm if either work for you?

5 Close/asking for meeting

At the end of a call, a low-commit call to action is often the best at gaining a next step. It's ability to deliver a low effort and casual agreement prevents the feeling of having to make big decisions. Remember, we're not asking anyone to work with us right now, just to spend a little more time together.

Would it be a bad idea for us to grab 5 minutes to discuss further? If we're not a fit after that, then no harm done. Worst case we can share insight into how your competitors are currently approaching hiring in this market.

Alternative choice - offering two dates and times - is a key play and ensures you remain control of the conversation. Open ended questions such as "when suits you?" can end up with a back and forth and a meeting in 4 weeks which is likely to get cancelled.

Always offer 2 dates and times within the next 5 business days.

“

Asking for the meeting can often be the part where we fall down. We build up the moment in our mind, the ask feels big and then we lose control of the conversation. A casual conversational ask with alternative choice means you retain control and it's less of a leap from the conversation you've just had. Practice makes perfect and role playing this section can produce significant gains not just in the meetings you book, but ensuring that the person actually turns up. Once booked, remember to send an email recapping why you're excited for the next chat and what you'll be discussing to reduce no shows/cancellations.



Martin Gutierrez

SDR Manager at SourceWhale

6 Practice makes perfect

It's important to take the time to record yourself and listen back. Many people overlook this crucial step, but it's actually really helpful. Without reviewing and practicing phone calls regularly, it's easy to lack confidence in this essential skill. A great way of analysing and assessing your approach is by creating a basic scorecard. Break the call down into:



Opener/Purpose



Pitch



Objection Handling



Close

Rate yourself on each area and look for 2Ps and a POD – 2 things done well (positive) and a POD (point of development) that you can focus on for your next call. Role-playing is also a useful way to build confidence in new techniques or on certain areas.

“

As the saying goes...“practice how you want to play”. Never underestimate the value of role play practice. The number of calls we make vs the number of prospects we speak with highlights the importance of being well equipped to maximise the small % of prospects that we actually get through to. We can't afford to waste that opportunity. There's a lot of pressure on recruiters to perform, so regular practice along with listening back to calls are invaluable. It allows us to experience real-life situations and practice handling difficult conversations in a safe environment so that we're confidently able to sell under pressure when on the phone to prospects.



Nicole Plinston

Co-Founder at This is Prime

Key takeaways

To help you feel confident with getting on the phone, follow these key action points to kickstart your journey.

1

Mindset

Maintaining a positive mindset is essential. Don't get knocked down by a 'no', use it to fuel your hunger for a 'yes'

2

Multichannel

The phone is a key conversion point. Use as 3rd touchpoint after an email and/or LinkedIn touchpoint

3

Leading with purpose

Don't dive in too quickly. Building relationships and adding value is essential. Always provide a compelling reason for your call

4

Objection handling

Take your time! Follow the LAER framework to avoid handling these too quickly

5

Close/asking for a meeting

Low commit, always offer alternatives and send a personalised follow-up

6

Practice makes perfect

Record yourself, rate yourself and continuously improve

Our contributors

A huge thanks to our experts for contributing their knowledge and guidance in mastering the art of cold calling.



Martin Gutierrez

SDR Manager at SourceWhale

Growing the US SDR function into a department which has generated millions of dollars of opportunities at SourceWhale, Martin creates and executes our BD, Calling and Coaching strategy each day with his team across the region.



Nicole Plinston

Co-Founder at This Is Prime

Nicole is the Co-Founder and Director at This Is Prime which is a specialist graduate sales and recruitment company. She boasts over 20 years of experience and brings strategic knowledge both as a business owner and a recruiter.



Ben Hobday

Co-Founder at Axel Talent

Ben built the London office at Austin Fraser from the ground up and has worked in recruitment for close to 15 years, with the last 10 spent building and managing recruitment sales teams across Technology. Now Co-Founder and Head of Sales Recruitment at Axel Talent, building from scratch means that BD, done right, has been his daily diet!



Chris Hatfield

Founder at Sales Psyche

Chris is the Founder of Sales Psyche, enabling reps and leaders to develop a high performance mindset and healthier mental wellbeing by equipping them with the right tools to thrive, rather than survive.

Additional resources



Ben Hobday - Don't micromanage. Search for emotional intelligence. Constantly educate yourself.



How to Execute and Operate a World-Class Delivery Function with Alex Morton



Chris Hatfield - How to break free from limiting beliefs



Cold Call Openers, Growth Mindset & Overcoming Imposter Syndrome with Sophie Nivern



Amber Penrose: No more cold calling, great BD, and Copywriting instead!



Amy Holder - How to build a market from scratch

The BD Playbook Series

Part Three: Using the phone

Part One: Outreach

Part Two: Personal Brand

Contact SourceWhale

Contact Hector

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