

NAVIGATOR

Phone Conversations

Sometimes it's awkward having conversations at first with potential clients. After being introduced, you are on your own.

Ideas

Here are a few tips to simplify some of your first few phone conversations with potential clients.

1. Opening Line

"How have you been?" This line puts many folks at ease right from the start. People don't hear it that often so it's an attention grabber. Stand out, be different. Get away from "How are you doing?" It's overused and seems insincere.

2. Know Why You're Calling

Before making a call, be sure you have a valid reason for it. Write it down, make sure it's jargon-free and understandable.

3. Have a Goal

In these early conversations, you should focus on *getting* a meeting. Don't try to solve for anything on these calls. Be clear, ask relevant questions, and be a good listener.

Call Example

Hi Elaine, It's Phil White from Mackinaw & Company. I enjoyed meeting you last week. Al knows every great coffee spot in town. How have you been? ... I'm calling to follow-up on our conversation ... We want our collaboration with you to be productive and useful. The best next step is getting together. Can you meet in our office on Tuesday at 4pm for a chat?

Bonus: It's great to use a phone conversation script or checklist to stay on track and touch on relevant points.

Idea Sheets provide quick and actionable suggestions to drive more referrals and introductions. Visit the [Navigator website](#) often for new additions.