



# PROACTIVE PURSUIT CHECKLIST

Regardless of whether you are selling for a Business-to-Business (B2B) or Business-to-Consumer (B2C) company, you should be making calls to prospects each and every week. This is one of the hardest parts of selling, and it's also the one that hones your message, rounds out your stakeholder map, fills your sales funnel and makes the rest of selling possible. So, don't hide behind your laptop screen...get on the phone.

Live conversations with real prospects allow you to test your message, your crispness and your persuasion. The purpose of the Sales Tool is to provide you with a checklist that - once complete - ensures you are ready to optimize your proactive pursuit and turn those cold prospects into warm leads.



## PREPARATION

- Prepare your target list of calls in advance. Always have more than you think you need
  - Do less than five (5) minutes of homework: look at LinkedIn/Insta/Twitter/Facebook/Website to gain one insight into your target person or company
  - Determine one or two discovery questions you will ask
  - Practice your opening out loud
  - Practice your voicemail out loud
  - Make your ask crisp and explicit
  - Make sure you are ready to use their name (if you can't pronounce it, ask them)
  - Have your prospecting script ready and in front of you/on your screen
  - Have your CRM open and ready for updating
  - Set achievable goals for the number of meetings you would like to secure
- Do not allow distractions. Give these two hours your full attention



## MINDSET

- This is the hardest work salespeople do. Your mindset should be one of doing good for the people you are reaching, while developing critical skills and disciplines
- Be humble
- Be gracious with assistants. Ask for their help. Respect their position. Be appreciative even if they aren't helpful.
- Be curious. Make sure they understand you are simply searching for the right person to connect with. No more. No less
- Channel positive energy and a desire to learn
- Remember that you are only asking for a meeting, nothing more



## GRIT

- Set aside two times per week (Weds and Thursday's are thought to be best, and I recommend early am's when fewer gatekeepers are present)
- On those days, GET UP AND GET AFTER IT
- Stand up in order to channel higher energy
- Split your two prospecting hours in half. Take a break at the midpoint and make fixes to your message, your mindset and your energy based the results of the first hour. Apply those changes to the next hour
- If possible, cold call with a buddy. Two people cold calling is more fun, and you can swap success and failure stories. You will also be quicker to recognize words and phrases that really work
- Update your CRM along the way, including monitoring the number of "touches" you've made to each prospect. If you are not above six for each target, you still have calls to make (research suggests that six tries and above is the sweet spot)



## RESILIENCE

- Chunk the work: Take a quick break every 30 minutes and walk around briefly
- When a call goes well, have a mini-celebration for a moment and then get back at it
- When you are rejected, don't take it personally. Focus on the future, and what you are learning
- Remind yourself of what works, and fix what doesn't
- Take three deep breaths
- Reward yourself when you are finished
- Find ways to make it fun: competition, awards, funniest call, biggest mistake
- Capture your lessons-learned in your scripts and CRM
- Share your successes by sharing which messaging and approaches are working and not working
- Plan your prospecting weekly to build the muscle

***If you can do this call, you can do any call***



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Below are two examples of what preparation looks like when using your proactive pursuit checklist.

## PREPARATION

### Example: B2B company selling software automation tool for attorneys

- Target:**  
(prepare your target list of calls in advance) Attorneys in Chicago area who have launched their practices within the last 10 years

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- Research:**  
(do less than five minutes of homework) LinkedIn: Susan X. Posting articles about running efficient law practices  
Website: Company website positions firm as an 'innovator' in the legal market

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- Questions:**  
(have 1-2 ready discovery question) How do you define 'innovation?' Why is that a differentiator for you?

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- Practice:**  
(your opening statement) Susan, my name is Craig Wortmann calling from XYZLegal Inc., a partner that helps attorneys and their firms get organized through automation. I see through both LinkedIn and your website that you think a lot about innovation. May I engage you in a very quick conversation about how to take innovation to the next level?

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- Practice:**  
(your voicemail) Susan, my name is Craig Wortmann calling from XYZLegal Inc., a partner that helps attorneys and their firms get organized. I see through both LinkedIn and your website that you think a lot about innovation. We have been helping people just like you show their clients how they put their money where their mouth is on innovation. I would love to see if I can offer you a perspective on this in less than five minutes. If you are interested, please call me at xxx.xxx.xxxx. Thanks much for the opportunity. Have a great day.

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- Your ask:**  
(make it crisp and explicit) Would it be possible to have a ten-minute conversation so I can offer three ways to think about your next step in innovation?

## PREPARATION

### Example 2: Individual seeking a sales role in the retail industry

- Target:**  
(prepare your target list of calls in advance) Clothing companies with physical stores and US based corporate headquarters

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- Research:**  
(do less than five minutes of homework) LinkedIn: Michael B. Hosting live sessions about how mindset makes all the difference.  
Twitter: Company handle is promoting language about how the whole family can find something to love in their stores

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- Questions:**  
(have 1-2 ready discovery question) Are you still seeking a passionate individual to join your sales team? Where does coachability fall in your desired attributes for a new hire?

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- Practice:**  
(your opening statement) Michael, my name is Craig Wortmann and I am calling for a very simple reason. I see on LinkedIn how passionate you are about the role of mindset. Personally, growth mindset has been instrumental as I seek out my next role in sales. I realize you weren't expecting this call, but would it be possible to set up a future meeting to talk about the open sales role on your team?

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- Practice:**  
(your voicemail) Michael, my name is Craig Wortmann and I have so enjoyed learning about your perspective on mindset via your LinkedIn Live posts. I am calling because I believe we have a similar outlook on the role mindset plays in a successful sales process and I'd like to set up a time to talk about the opening you have on your team. If you call back, I'd like less than 5 minutes to try to convince you I deserve an interview. I'm very appreciative. I can be reached at XXX.XXX.XXXX. Have a wonderful day!

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- Your ask:**  
(make it crisp and explicit) Would it be possible to set up a future meeting to talk about the open sales role on your team?

*If you can do this call, you can do any call*



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## PREPARATION

**Target:**  
(prepare your target list  
of calls in advance)

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**Research:**  
(do less than five  
minutes of homework)

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**Questions:**  
(have 1-2 ready  
discovery question)

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**Practice:**  
(your opening  
statement)

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**Practice:**  
(your voicemail)

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**Your ask:**  
(make it crisp and  
explicit)

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... and don't forget to check in on your **Mindset, Grit and Resilience.**

*If you can do this call, you can do any call*