

## 4.2: Setting Sales Call Objectives

### Learning Objectives

- Learn how to set SMART pre-call objectives.

Identifying your prospect's need is only part of your pre-approach research. There's still more research and planning for you to do before you meet with or speak to the customer.

### Determine Your Objectives

If you haven't determined what you hope to achieve before going into your sales call, it will be difficult to figure out what to say once you arrive or once you have your prospect on the phone. Setting **pre-call objectives** is a strategically important step. If you have clear goals, you will be more confident and appear more organized, and it's more likely that you will see results. Your customers are busy people, and you don't want to waste their time. They will appreciate your organization and will be more likely to trust your judgment if you come prepared. You also don't want to waste *your* time or your company's time.

As you plan your meeting, ask yourself this question: "What will success look like for this call?" "How to set winning sales call objectives for maximum conversions?" <https://www.salesmate.io/blog/sales-call-objectives/> (accessed May 22, 2024). That may seem like a question with a straightforward answer, but success doesn't always mean closing the sale. In some situations, you'll experience a **one-call close**, but with larger sales, particularly in B2B sales, the **sales cycle**, or the length of time it takes to go from the first contact with the customer to closing the sale, is generally longer—sometimes even taking up to a year or longer.

If you know that you are facing a longer sales cycle, the goal of your initial call might be gathering and conveying specific information to move forward in the sales process or further qualify your prospect. In more complex sales it's realistic to set a pre-call objective of establishing rapport and trust, making new contacts in the organization, qualifying your prospect's budget, or discovering what your prospect's decision-making process is. You should also consider your prospect's objectives: what outcome is she hoping for from this call? Sometimes, setting strategic, information-gathering objectives may actually help you shorten your overall sales cycle. "How to set winning sales call objectives for maximum conversions?" <https://www.salesmate.io/blog/sales-call-objectives/> (accessed May 22, 2024).

### Make Your Objectives SMART

So it's early in the process of a complex sale, and you are setting your goals for your next meeting with your customer. You know it will primarily be an information-gathering session because you need to know more before you can propose a workable, specific solution. However, if you go into the meeting with a vague plan like "I want to find out more about my prospect's business," you won't accomplish much. Instead, you might come up with a goal similar to the one mentioned earlier: "By the end of this meeting, I want to know who my prospect's current vendors are, what issues or challenges he faces with this vendor's services, and what three priorities he has for future purchases." This objective, like all effective pre-call objectives, is **SMART**. That is, the goal is Specific, Measurable, Achievable, Realistic, and Time-bound. Team Asana, "What are SMART goals? Examples and templates", February 3, 2024, (accessed May 22, 2024).

- **Specific.** The goal should clearly define which actions you want your customer to take, what information you hope to convey, and/or what information you hope to learn from your sales call. In the example cited by Gary Duncan, the salesperson is setting out to gather three specific pieces of information.
- **Measurable.** You want to be able to measure the results of your efforts so that you'll know at the end of your sales call how close you came to achieving what you set out to do. This will help you strategize about which actions to take next. The first two parts of the example are measurable with a simple yes or no (Did I find out the names of the current vendors? Did I identify issues and challenges my customer has encountered?), and the last part of the goal is quantifiable (How many of my customer's priorities was I able to help him articulate?).
- **Achievable.** If a goal is achievable or attainable, it's something you can actually *do*. It might involve asking questions, explaining something, or suggesting something. Whatever the case, it should be something on which you have the ability to act. In some instances, the actionable goal might be as simple as closing the sale: "By the end of the meeting, I plan to convince my prospect to sign a contract."
- **Realistic.** If you set your goal too high or try to move your sales process along too quickly, you will only be setting yourself up for disappointment and failure. Ask yourself, "What can I reasonably hope to accomplish given the current situation with my

prospect?” If you decide you want to get appointments with ten top people in the organization during your first contact with the company, or if you intend to close a major account by your first call, you will probably not be able to achieve what you set out to do.

- **Time-bound.** Not only should you know *what* you hope to achieve, but you should also know *when* you hope to have it accomplished. In the example objective, your time frame is “by the end of the sales call.” Other times, you might set a specific date—for example, “Get the prospect to agree to schedule a face-to-face meeting by the 15th.”

## Key Takeaways

- It’s important to know exactly what you want to accomplish when you go into a sales meeting.
- The goals for your sales call should be specific, measurable, actionable, realistic, and time-bound: **SMART**.
- Setting **SMART** goals will help you direct your approach, take action, and measure the results of your sales call.

### ? Exercise 4.2.1

1. Which of the following is a SMART goal for your first sales call on a prospect to sell car insurance? Rewrite each of the other goals to be SMART.
  - Identify current insurance carrier and conduct needs analysis by Friday.
  - Call the customer and ask some questions to learn about his current situation.
  - Conduct online research about the customer and understand why he chose his current insurance carrier.
  - Call at least six new prospects by the end of the day today.
2. Imagine you sell website consulting services and are going into a sales call with an existing customer. You want to expand the selling relationship in two ways: by extending your contract with the customer for another two years and by getting referrals for the network support department. Identify your SMART goal for this sales call.
3. Assume you are a financial advisor and you are meeting with a prospect for the first time. Identify a SMART objective that you would set prior to your first meeting.
4. Describe the difference in the sales cycles between selling jeans to a college student compared to selling a home to a newly married couple. What impact will that have on your SMART objectives?
5. You are a sales rep for medical supplies and just took on a new prospect, Springfield Nursing Homes, a regional chain of twenty-two nursing homes. You have a contact, but you are not clear if he is a decision maker. In the past, the company has allowed each nursing home to make its own purchasing decisions, but it is moving toward a more centralized approach. This is an excellent opportunity for you to present your comprehensive product line. You are preparing for your first call, and your sales manager has asked you to review your SMART objectives for the call with him. What are your SMART objectives for the call? How you will present them to your sales manager?

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