

THE EXPERT GUIDE TO

REMOTE VIDEO SALES CALLS



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It's time to adapt



It's time to adapt

The world is changing before our eyes. Every day (almost every hour) there's news about the spread of COVID-19, the measures being taken to stop the spread, and the significant changes involved for businesses around the world.

Businesses in many countries have suddenly been forced into a completely different work situation: that of being 100% remote with no warning and no time to prepare.

If you've suddenly gone from working in an office to working remotely in sales, you need to make some big adjustments.

Now is not the time to look longingly at the past. Now is the time to adapt and keep moving forward.

If you're reading this, it means you're looking for resources to keep you working effectively from home. In this book, you're going to find everything you need to become a master at remote video sales calls.

If you need more help transitioning to remote selling, check out our [Remote Sales Survival Guide](#), a learning center that's constantly updated with the best resources for remote sales during the COVID-19 crisis.

You are not alone: We're all going to fight this crisis together.

A stylized, handwritten signature in black ink that reads "Steli".

Steli Efti, Close Founder & CEO

Prospects canceling in-person meetings?

Here's how to close those deals anyway.

Your buyers no longer want to meet in-person. You had 10 meetings scheduled for this week, but they've all called in the last hour to say they're no longer at the office, or they're not allowing non-employees into the building.

Sound familiar?

When in-person meetings are canceled, there is a simple alternative: run a video sales call.

This is how you switch an in-person meeting to a video call:

Prospect: "I'm sorry, but we're going to have to cancel our meeting on Friday. Our office shut down and we're all working from home now."

You: "I'm so sorry to hear that. We recently switched to remote work as well, so I know how you feel. By the way, does your team use Zoom?"

Prospect: "Yes, we recently got set up with it for internal meetings."

You: "That's great. How about we change our meeting on Friday to a Zoom meeting?"

Prospect: "Alright, that sounds great!"

See how easy that was? You can still hold the same meetings via Zoom or another video chat software.

But, what if you just don't feel comfortable doing remote video sales calls?

How to close deals when you rely on in-person meetings

Your close rates are great when you do an in-person sales presentation. But when you try to close deals remotely, it just doesn't seem to work.

Some products just sell better when you show up at the prospects' door and sell in person. How can you avoid having your deals fall apart now that the COVID-19 crisis makes in-person meetings almost impossible?

Keep reading.

If you want to adapt to this new situation, you need to become a master of video sales calls. Use the steps in this book to prepare well, run a stunning presentation, and close deals remotely, even when you don't feel comfortable doing so.

Why is this so important? Because the world is changing. Who knows when things will calm down enough for you to go back to in-person meetings?

It's time to adapt or die.

Before the call



Before the call

If you hate video sales calls, or if you've just never done them before, then this is where you need to start.

How can you schedule a video call with your prospects that they'll actually want to attend? How can you prepare for the call so that your palms aren't sweaty and your mouse isn't shaky? What do you do when the prospect doesn't show?

How to schedule your remote sales call

Before you even think about selling your product, you need to sell the call.

When you're scheduling a remote sales call with your prospects, show them why this call is going to benefit them.

Don't focus on the features of your product just yet: instead, focus on the call itself.

Basically, you need to answer this question: Why should your prospects take time from their busy schedule to meet with you?

The answer should be one of these two reasons:

- Attending this video sales call will save them time
- Attending this video sales call will help them be more successful

For example, if the prospect is objecting to a video sales call because of the time involved, you could say something like this:

“From what you’ve told me, your business could see huge benefits in X and Y from using our product. This could be a real game-changer for you, and I’m sure you’ll figure that out if you keep reading documentation and trying out our software. But if you want, we can just take 30 minutes and I’ll show you exactly how our product can solve X and Y problem for you.”

If your prospect is objecting because they just don’t see the value in the video call (and don’t want to change out of their pajamas to meet with you on Zoom), you could say something like this:

“The purpose of this video call is to help you figure out if our product can help you, and you can get all of your questions answered by our product experts. We’ve actually seen that new customers are 44% more likely to succeed with our product when they’ve attended a 30-minute meeting like the one we’re talking about.”

When you point to the real value of the video call itself, you’ll help convince your prospects that it’s worth their time and effort.

How to prepare for a video sales call

If you’re not used to doing video sales calls, your nerves are going to show. That’s why it’s essential to prepare in advance and get those first-time jitters out of your system before you’re presenting to prospects.

Here are some top ways to prepare both your agenda and your technology for the perfect remote sales call:

Know and test your tools

If you're not used to doing video sales calls, you're probably not comfortable with the tools you'll need to do so.

Before you even think about getting on a call, it's essential that you learn the ins and outs of these tools.

Start with your video chat tool, like Zoom. You need to learn how to set up a call, start a meeting, toggle the mute button, share your screen, and invite new participants.

You should also take a quick look at tips that will help you use these tools smarter. For example, did you know that [Zoom integrates with Close](#)? That means you can schedule, start, and record your Zoom meetings from inside your CRM, giving you context on who you're talking to and previous interactions right from the same screen. It also means you can take notes in the lead view, adding comments in context.

The screenshot displays the Close CRM interface. On the left, a sidebar shows the contact profile for "Oskar Enterprises" with fields for tasks, opportunities, contacts, and custom fields. The main area shows a "Close Demo" meeting scheduled for today at 6:00pm. Below the meeting details, there is a section for "Accepted: Close Demo @ Tue Jan 7, 2020 6pm - 6:30pm (PST)" with a confirmation message from "uif@rocket.to". The interface also shows a list of attachments, including "File.ics (text/calendar) OK" and "invite.ics (application/ics) OK". At the bottom, there is a chat window with a message from "Hey Oskar, Andrea here - sorry I missed your call yesterday. What time works best to give you a call back today? I'm fairly available any time from 10am - 1pm."

Before your remote sales call, make sure you test all of the tools you're planning on using. That way, you won't have any surprises during the actual presentation.

Have a clear agenda and goal

Just like any sales meeting, you need to have a clear agenda to follow for your video sales call.

To create an agenda, focus first on the main goal for this call. What will be your next steps? What's the ideal outcome for this meeting?

Then, work backward. How can you get the prospect from where they are now to that goal? If you want this to end in a close, how can you use this meeting to make your product irresistible? If you want to get multiple decision-makers on board, how can you address their needs or concerns during the presentation?

By working backward from the goal, you'll be able to set a clear agenda that will guide the call in the right direction.

Set up your video and background

It's already hard enough to make sure your prospects are paying attention to you on a video call. So, don't let your webcam placement or background distract them even more.

Start by making sure that your webcam is placed at eye-level, and isn't off to the side of the screen you'll be looking at during your presentation.

Next, check your lighting. Make sure light is coming from in front of you, not behind you. If possible, get a small desk light that brightens your face, and avoid having a window or lamp behind you.

Finally, check your background for distractions. Turn on your camera before the call to check what can actually be seen behind you. Then, clean up that view.

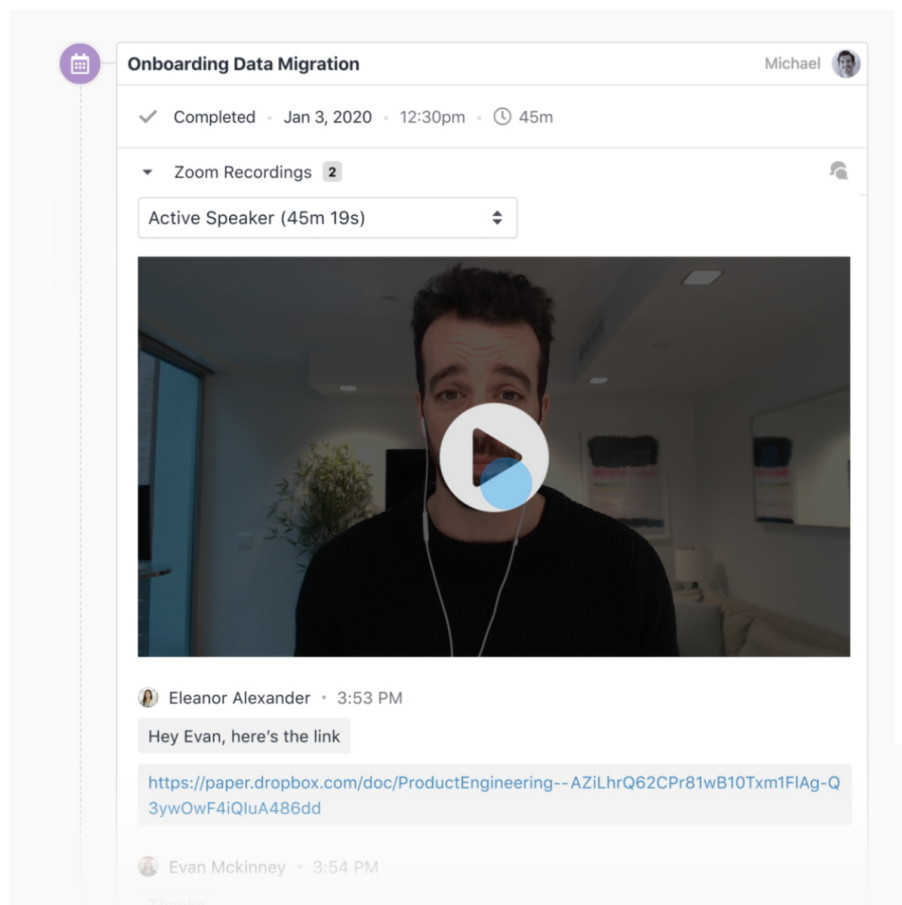
Prepare your tabs and windows on the screen

Right before the call, open up any tabs, slide decks, or apps that you plan on using or showing during the video call. You don't want to have your audience waiting while each new screen loads.

You'll also want to make sure that all notifications and pop-ups are turned off. That way, your prospects won't see your new emails or Slack messages from your team or other prospects.

Remember to record

With Zoom and many other video call tools, you can automatically record your video calls and save those recordings for later. In fact, if you integrate Zoom with Close CRM, those recordings will be saved automatically in the lead view.



That way, you can go back and see what went well, what didn't, and what you can do to improve your virtual presentations. While it might be somewhat painful to go back and watch yourself present, it's the best way to work on your video call skills and get better at presenting in a remote setting.

Since remote sales calls will be necessary for the foreseeable future, it's essential that you improve these skills.

Dealing with no-shows

It's a lot easier to miss a meeting scheduled via video chat than to miss a physical meeting at your office. That's why you may see more no-shows on video sales calls than you did with in-person meetings.

How can you deal with no shows?

First, before your meeting, **send multiple reminders**. Let the prospect know that you're committed to and invested in this remote sales call, and they'll be more likely to take it seriously.

Next, if the prospect doesn't show after a couple of minutes, **send an email with the Zoom link and information again**.

After 10 minutes, don't keep waiting. It's time to reschedule that meeting.

In Close, you can **set up an automatic email campaign to reschedule this meeting**. Be gentle, but clear. Tell them you missed them, and ask them if a specific time and day works for them to reschedule this meeting.

Finally, if your prospect is a no-show, make sure you spend the time you planned to use with them productively. Don't fill those 30 or 60 minutes with busy-work: have a backup plan in place and use that time wisely.

Now that you're prepared for your video sales call, let's level-up your skills during the call.

During the call



During the call

You finally got your prospect to agree to a video call. You've prepped your agenda, your background, and your tabs are all open. They log in, and they even have their webcam on!

Looks like you're off to a great start.

Now what?

Use qualifying questions to make the call relevant

Your qualifying questions will be the basis for structuring your call. Hopefully, you've already done some qualifying with this prospect before the call. You probably know their biggest pain points and some information about their business. But you need more.

Obviously, you can't start talking about a solution when you don't fully understand the problem. On the other hand, don't turn this video sales call into an interrogation. Weave the right questions into your conversation to get a better understanding of their needs.

Basically, there are four main areas you want to qualify your prospects in:

- Customer profile match
- Needs

- Decision-making process
- Competition

Start by asking them to clarify or open up more about a subject you've already discussed. For example:

"I understand that your company is having issues with keeping track of leads. Where are you currently storing leads? Why isn't that working for you?"

Or:

"From what we talked about on the phone last week, it sounds like your sales team is lacking a clear view of their pipeline. Can you walk me through your current pipeline setup?"

Then, use their answers to make the sales call even more relevant to their individual situation.

How to make prospects pay attention on a remote sales call

When you're not face-to-face with a prospect, you should never assume that you have their undivided attention. They're most likely on their phone and have 17 other browser tabs open while they're on a call with you.

If it's a video call and they also turn on the camera, at least you can gauge from their facial expressions and their eyes if they're focused on the call. But if not, how can you tell whether they are paying attention? And most importantly, how can you gain and keep their attention?

Pick three main points you want your prospects to walk away with

When creating your agenda, you decided on a goal and worked backward to build a sales call that would lead the prospect to that goal.

Within that agenda, you need to fix three absolutely essential points that your prospects should remember.

Obviously, your prospects won't remember everything you said. But if you pick three unforgettable points, you can highlight those to make sure your prospects are paying attention.

Here's how to introduce your essential points so they'll pay attention:

- Start by saying their name
- Tell them clearly that what you're about to say is important
- Lower your volume to make them listen more

When you pick three essential points and highlight them during the call, your prospect will be more likely to remember these after the call.

Put value into context with questions

A video sales call should be more dynamic and interactive than an in-person meeting would be. When a remote call is presented as a conversation rather than a monologue, you'll be able to judge how attentive your prospects are.

This is especially true when your prospects don't turn on their video. By asking questions, you ensure your prospects are involved in the call and can judge their reaction by the tone of voice even if you can't see their face.

One way to use questions is to put context around the value of your product and the benefits of using it.

For example:

You: "I understand your sales team isn't as productive as you'd like them to be. How much time do you think your team wastes every week on data entry and other repetitive tasks?"

Prospect: "I'd say each rep spends at least 5 hours per week on these kinds of tasks."

You: "Wow, and how many reps do you have on your team?"

Prospect: "We have 15 reps."

You: "So we're talking about 300 hours per month that your sales team is losing. That's more than 3,000 hours in a year that your sales team isn't using to sell. Now, I'd like to show you how Close CRM can get your team back those 3,000 hours and spend them actually selling to your prospects. Does that interest you?"

Prospect: "Absolutely!"

Use relevant, simple slides to visualize your points

Another way to make sure your prospects are paying attention is to optimize your sales decks for video sales calls.

First of all, make sure all of those slides are relevant. Cut down on extemporaneous information: focus on what's really relevant to their business.

Next, make sure your slides are simple. Don't crowd them with text or visuals. Make them clean, interesting, and easy-to-understand. You don't want your prospects

wondering about the meaning of a graph while you're trying to explain an important benefit of your solution.

Using these tips, your video sales presentations will capture and hold the attention of your prospects, at least for the most important points.

How to deal with technical difficulties

Not all of your video sales calls will run smoothly. Maybe the internet will lag and you'll both have to turn off your video. Maybe your presentation will get stuck. Or maybe that tab you prepared just won't open.

When things go wrong, **don't panic**. (This is obviously easier said than done.)

To reduce panic when things aren't going right, have a few lines prepared in advance. For example, if a window is taking longer to load than you were expecting, don't just wait in awkward silence. Have something prepared to say while you wait, that way the delay won't seem so eternal.

Keep working on the skills above to adapt your presentation skills to the new normal of video sales calls. This will help you be calmer on the call, and prepare you for the perfect ending.

How to end the call



How to end your call

Your time is up: you're ready to do that awkward video-wave and say goodbye.

Or are you?

Before you end your remote sales call, make sure you go through these three essential steps:

Summarize your three important points

Remember those three essential points you wanted your prospects to remember? The last few minutes of your call is your last chance to make sure your prospects remember those points after you hang up.

So, ask a question like:

- What were the highlights of this conversation for you?
- In the pitch today, what did you find most impactful?
- I'm curious, what was the most interesting thing you learned in this conversation?

If they don't hit all three of your main points, add something like this:

“That’s true, what you said was really important. One more thing I want you to take away from this call is...”

Highlight your weaknesses

Every solution has its problems and weak points. Most sales reps spend a great deal of their presentation praying that the prospect doesn’t bring up those objections.

Thankfully, you’re not like most sales reps.

Don’t wait for prospects to bring up the weak points of your product and then fumble for an answer you don’t have.

Instead, turn the situation around by highlighting the weaknesses of your solution at the end of your call. When you bake those objections into your presentation, you can also prepare concise solutions to each problem, even if that just means acknowledging the problem exists and explaining how you plan to fix it.

Why does this work? Because it’s an excellent way to build trust. And building trust is even more important on a video sales call than an in-person meeting.

Since both parties will be missing some of the social cues you’d normally get when in-person, you need to work harder to be that trustworthy figure your prospects want to buy from. That’s why including your product’s weak points in your video sales call is so important: you’ll contribute to a transparent, honest exchange and will gain the trust of your prospects.

End with a close

If a specific goodbye isn’t in your sales script, it should be.

Why? Because if you're not prepared to end this call productively, you're wasting the most powerful part of your video sales call.

You have them on the line now. They've just heard about your product, it's fantastic features, and you've essentially removed any objections they might have. Right now, your prospect is excited to buy.

So, sell them while they're in the buying mood.

Of course, you'll need to use your good judgment to see if now is the time to close the deal. If you think the prospect isn't quite there yet, at least sell them on the next step in your sales funnel.

Here's the point: Don't end the call without clearly defining where you'll go from here. By the time you end the call, both parties should know what the next steps are and when they'll be taken.

And if you play your cards right, you could actually close the deal right here, right now.

After the call



After the call

You can breathe again: your camera is off, the call is over, and everything went fairly smooth. But your work isn't over yet.

After the call, here are the two main things you need to do:

Realistically evaluate your call

Just because you really got along and your video call didn't have any major hiccups, doesn't mean this was a successful remote sales call.

To realistically evaluate how things went, ask yourself these questions:

- Did the prospect give you clear, detailed information?
- Were they open and authentic when speaking about their business and needs?
- Were the next steps clearly defined at the end of the call?
- Did the prospect seem excited to take those next steps?

Using these four questions, you'll be able to judge the temperature of your prospect and get a better idea of how likely they are to close.

But how can you make sure you answer those questions accurately? Simple: Don't rely solely on your own imperfect memory.

When using Close CRM in step with Zoom for your video sales calls, you can easily record your calls and revisit them after the call is done, as mentioned above. By rewatching key parts of your video sales call (especially the ending), you can judge how excited the prospect is to buy and also look out for anything you could've done differently.

The screenshot displays the Close CRM interface. On the left is a dark sidebar with navigation options: Inbox (1), Opportunities, Leads, Email Sequences, Reporting, SMART VIEWS, Calling, Calling (business hou...), Email 1, Email 2, Opportunity Follow-up, Support & FAQs, Integrations, and Settings. The main area shows the contact record for 'Cyberdyne Systems' (Artificial intelligence and robotics). It includes sections for TASKS (0), OPPORTUNITIES (0), CONTACTS (3), and CUSTOM FIELDS (0). The CONTACTS list shows three individuals: Alec Rosenbaum, Alex Prokop, and Ben Cohen, each with contact icons. Below this are links for Google Search, View Event Log, Merge Lead, and Delete Lead. On the right, a 'Zoom Meeting' card is visible, showing a completed meeting from today at 4:20pm lasting 40m. It features a 'Zoom Recordings' section with a 'Shared Screen With Speaker View' and a video player showing a man pointing. Below the video, it indicates 'Event Details - 4 guests' with '1 Yes' and a note 'Created manually an hour ago'.

By doing this, you'll not only have a clearer view of each deal's health in the pipeline, but you'll also improve your video sales call skills.

Follow up, follow up, follow up

Even the best calls can sometimes be followed by crickets. What if your prospect doesn't move forward with the next steps? How long should you wait around for a

response? If you follow up once after the call and they don't respond, what should you do then?

Here's my rule of thumb: Keep following up until you get a response.

It's that simple.

You've already had a conversation with this person, and they haven't given you a hard no. If your prospect drops off the face of the planet after a great video sales call, just keep following up until they tell you something.

As far as frequency, you want to start high and decrease over time. This is the schedule I use for follow-ups:

- Day 1
- Day 3
- Day 7
- Day 14
- Day 28
- Day 58

After day 58, I'll reduce that follow-up frequency to once a month.

To remember this, just use your CRM (like Close) to set follow-up reminders at specific intervals.

In my experience, I've found that the best medium to follow up is email since you can follow up more without being intrusive. If you need a quicker response, however, a phone call also works.

Looking for something a bit more unconventional? Following up via SMS is a great way to cut through the noise in your prospect's inbox, and you can even use Close CRM to create and send text messages to prospects.

Want to make sure your follow-ups are well received? Follow these three rules:

- Never try to guilt them into responding
- Keep a warm, friendly tone
- Make it short and sweet

By following up consistently until you get a response, you'll squeeze all the juice out of your pipeline and make sure no deal gets left behind.

But what if you do get a response, and it's not the response you wanted?

What to do when your prospects postpone the purchase

Even though your video sales call went great and the prospect seemed happy, now they've changed their tune and it seems like this deal is never going to close.

What happened?

We live in a constantly changing world, and the COVID-19 outbreak has changed the priorities of a lot of companies. Your original pitch may have been based on wants and needs that have morphed over the past weeks for this prospect. That means a purchase they were excited about just isn't a priority anymore.

It's your job to make your solution a priority again.

The best thing you can do at this point is to ask questions to find out where the prospect's main priorities are. Start by asking questions like these:

- What's your most urgent need right now?
- With everything that's changed in the last few weeks, what's your current priority?
- What are the KPIs you need to reach?
- How are you planning to meet your current goals?

Using these questions, draw out the main priorities of this prospect. You may discover a change in direction, and this change could also spell opportunity.

After you understand their current priorities, ask yourself: How can our solution help them accomplish their goals or fill their current needs?

Now, you can work to present your product as the solution they still need, but for different reasons.

You can win at video sales calls



You can win at video sales calls

Throughout this book, you've learned how to prepare your mind and your #WFH office for a video sales call, how to capture attention and help them focus on three main takeaways, how to end a call by anticipating objections and going for the close, and how to evaluate and follow up after a video sales call.

In your hands, you have all the pieces involved in running remote sales calls that win more deals.

I know times are changing. It's uncomfortable for some and downright painful for others. But now is the time to take control and start winning at video sales calls.

When you work at the skills we've discussed above, you'll improve in the way you conduct remote sales calls. But when you combine that with using the right tech, you'll become a video sales call champion.

That's why now is the time try out Close, a CRM that's optimized for remote sales teams. Use Close alongside Zoom and 10x the power of your video sales calls.

With the right skills and the right tech, you'll be able to work through this crisis and be prepared for whatever comes down the road.

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