

**BONUS**

THE EXPERT GUIDE TO  
REMOTE VIDEO SALES CALLS

# Video call checklist



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With so many teams transitioning to remote sales with no warning and no time to prepare, we've gathered these essential steps to help you crush your remote video sales calls and keep selling through this worldwide crisis.

## 1. Scheduling your video sales call

If your in-person meetings are getting canceled, use these steps to schedule a video sales call you can do from the comfort (and safety) of your home:

- ☐ Introduce prospects to the video call tools your team is using for remote work
- ☐ When a prospect calls to cancel an in-person meeting, directly ask to switch that meeting to a video call
- ☐ Show how this video sales call will either save them valuable time or help them be more successful
- ☐ When sending the invitation, make it clear this is a video call. If they're aware and prepared, they'll be more likely to turn on their webcam

## 2. Preparing for the video call

If you're new to video sales calls, you might not be 100% comfortable with them. Here's how to prepare for your call and calm your nerves:

- ☐ Take your video call tool for a test run and learn where all the controls are (especially the mute button)
- ☐ Find ways to integrate the tools you're using for a smooth process (like integrating Close CRM and Zoom)
- ☐ Test your webcam placement, and clean up the area that can be seen in the background
- ☐ Make sure the room's light source is in front of you, not behind you
- ☐ Prepare tabs, windows, and apps that you want to use or present
- ☐ Make sure all desktop notifications are turned off
- ☐ Create an agenda by working backward from the main goal of this remote sales call
- ☐ Choose three main points that you want your prospects to remember
- ☐ Record your video call so you can review it later

### 3. During the video call

Once you have your prospect on the line, how should you run your video sales call? Check this list of must-dos during your call:

- ☐ Be respectful of their schedule by beginning and ending the call on time
- ☐ Weave more qualifying questions into the call and make your pitch more relevant
- ☐ Ask questions to keep both sides speaking (and paying attention) throughout the whole call

- ☐ Ask for attention before stating the main points
- ☐ If you present slides, make sure they are simple visuals that add value to what you're saying
- ☐ Expect some part of the tech to go wrong, and prepare something to say or questions to ask in those situations

## 4. At the end of your call

You've made it through the video call, and now you're at the end. Here's how to really take advantage of your last few minutes:

- ☐ Summarize the three main points you want your prospects to remember
- ☐ Build trust by being transparent about your product's weak points, and explain clear solutions to known issues
- ☐ End the call with a sale: either close the deal or sell them on the next steps

## 5. After the call

When your remote video sales call is over, check these items off your to-do list:

- ☐ Evaluate your call by rewatching the recording
- ☐ Determine the success of your call by how clearly defined the next steps were and how excited your prospect seemed to take them
- ☐ Keep following up until you get a response
- ☐ Make sure your product continues to be a priority for them by adapting to their shifting needs during this turbulent time

Want even more resources to help you adjust  
to selling remotely during the COVID-19 crisis?

## Check out our Remote Sales Survival Guide

[ACCESS THE GUIDE FREE →](#)

