

NEXT-GEN

PROSPECTING TOOLKIT



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INDIVIDUAL PRE-CALL PROSPECTING CHEAT SHEET

Use this prospecting call cheat sheet to create a roadmap for prospecting calls and ensure you can connect, convert and understand prospects to your best ability.

Prospecting Organization's Name:	
Type Of Business:	
Address:	
Contact Person:	
Decision Maker:	
Main Contact Telephone:	
Main Contact Email:	

Source of lead: (e.g. Referral, Cold Call)	
Goal Of call:	
Prospect's Needs/Goals:	
Ways to fulfil Prospect's Needs/Goals:	
Prospect's possible objections:	
Responses to objections:	
Extra - ways to ensure customer satisfaction:	

PERSONAL PROSPECTING PROGRESS PLAN

To keep that pipeline full and functioning, you must fill it with prospects! Use this helpful personal prospecting plan to keep various prospects organized and accessible at a glance.

Organization	1.	2.	3.
Contact			
Source Of Prospect			
Appointment Date			
Contact Number			
Outcome Of Call			
Follow-up Plan			

Organization	4.	5.	6.
Contact			
Source Of Prospect			
Appointment Date			
Contact Number			
Outcome Of Call			
Follow-up Plan			

PERSONAL PROSPECTING PROGRESS PLAN

Organization	7.	8.	9.
Contact			
Source Of Prospect			
Appointment Date			
Contact Number			
Outcome Of Call			
Follow-up Plan			

Organization	10.	11.	12.
Contact			
Source Of Prospect			
Appointment Date			
Contact Number			
Outcome Of Call			
Follow-up Plan			

USING AI TO SUPERCHARGE YOUR PROSPECTING

Prospecting takes a lot of time. But if you aren't using AI tools like ChatGPT, Gemini, Claude, or Copilot to speed up your workflow, you're working harder than you need to. AI isn't here to replace you; it's here to be your ultimate sales assistant.

Here are 3 simple ways you can start using AI today to book more meetings:

1. The "10-Minute Deep Dive" Research

Don't spend hours scrolling through a prospect's website. Paste their website URL or a recent press release into your AI and ask: *"Summarize what this company does in 3 bullet points, and tell me the top 3 challenges a [Job Title] at this company is likely facing right now."*

2. Writing First-Draft Cold Emails

Writer's block is real. Give your AI a prompt like: *"Write a short, friendly cold email to [Name], the [Title] at [Company]. Mention that I noticed they recently [Trigger Event], and ask if they are open to a 10-minute chat about [Your Solution]. Keep it under 100 words and make it sound conversational, not salesy."*

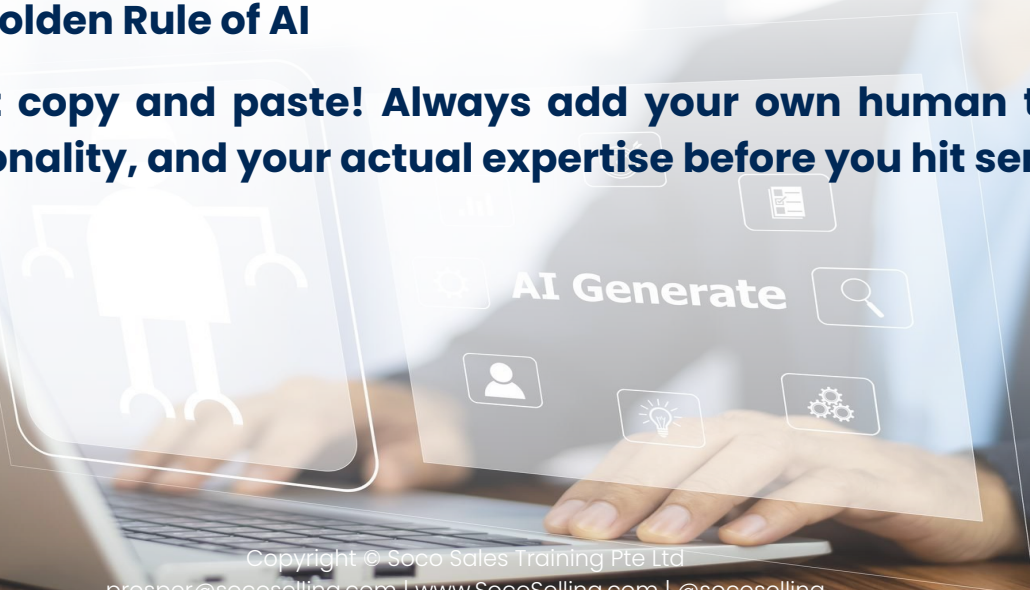
3. Practicing Your Objection Handling

Want to warm up before a big call? Use the voice mode and tell your AI: *"Pretend you are the busy CEO of a tech startup. I am going to try and sell you my software. Give me your toughest objections and let's roleplay."*



The Golden Rule of AI

Never just copy and paste! Always add your own human touch, your personality, and your actual expertise before you hit send.



COLD EMAIL TEMPLATE

Before you delve into our best sales prospecting email templates that you can use to engage cold prospects, it's best first to understand the make-up of an excellent sales prospecting email:

1. A Reason

You know what your company is offering – but what is the value to your prospect? Simply having the lure of a new product release or special promotion isn't enough – prospects want to know ***what's in it for them***.

2. A Pressing Reason

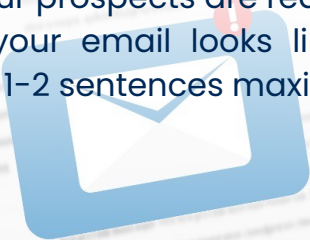
Simply stating your offering isn't enough. What's the actual reason your prospects should move to action? For instance, if there's no relevant pain point, fear of missing out, trigger event, or promotion, then there's no real reason to buy. Tell your prospect why you're reaching out – and ***what's in it for them***.

3. A CTA

Tell your prospect explicitly ***what you want them to do next***, whether that's meet with you for a 15-minute phone call or simply ask them to sign up to your newsletter for more actionable, helpful tips.

4. Keep it Mobile-Friendly

Over half of your prospects are reading your email on their phone while waiting in line for coffee. If your email looks like a giant wall of text, they will delete it. Keep paragraphs to 1-2 sentences maximum.



4 COLD EMAIL TEMPLATES

Pro Tip: Your subject line should feel like an internal email from a coworker. Keep it to 3-5 words, and use lowercase letters. Example: "quick question about [topic]"

1. [Prospect name], need help with [specific challenge]?

Hi (*Prospect name*),

Are you struggling with (*specific issue*) at (*company name*)?

I know from working with companies like yours, such as (*name drop competitors*) that the struggle is real.

I have a couple of ideas that might help – can we schedule a time to discuss this?

(*Your signature*)

P.S. In the meantime, check out these resources I've put together that address (*specific issue*).

2. [Pain-point] making you [emotion]? I can help.

Hi (*Prospect name*),

From your website and socials, I can tell that you're trying to (*accomplish/solve a specific goal or challenge your solution addresses*).

Without making too many assumptions about your goals, I'm optimistic (*your solution*) can play a pivotal role in your success.

While I'm familiar with your company, you might not be familiar with (*your company name*). We help businesses in (*the prospect's industry*) with three main goals:

(*Your benefit #1*)

(*Your benefit #2*)

(*Your benefit #3*)

Are you free on [*day*] at [*time*] for a short call to discuss how I can help?

[*Your email signature*]

4 COLD EMAIL TEMPLATES

3. A better way to solve [challenge]

Hi *(Prospect name)*,

I know you're busy, so I'll keep this short.

As a *(your title)* at *(your company name)*, I speak with people like you about *(solving a challenge)*. *(Prospect company name)* is on my radar because we've helped many similar companies in *(prospect industry)* with *(specific issue)*.

Can I schedule a 10-minute call with you to discuss your strategy for overcoming *(prospect challenge)*? Hopefully, I can provide some insight into how best to achieve this – alongside some actionable tips for the meantime.

Best,

(Your signature)

4. Can you help me?

Hi *(Prospect name)*!

I'm trying to figure out who is in charge of *(the situation you solve)* at *(prospect company name)*.

Would you mind pointing me in the right direction – or directly connecting me with the person in question?

Best,

(Your signature)

6 PART PHONE SALES SCRIPT FRAMEWORK



Step 1 – Introducing yourself

- Avoid “Robot Voice”. Speak to them exactly how you would speak to a respected colleague. Stand up, smile while you talk, and just be a human being.
- Start with a positive attitude
- Ask for permission to continue talking

Your Script

Step 2 – Building Rapport



- Mention a common interest
- Ask an insightful question about their current projects.
- Offer advice
- Talk about the prospect’s business

Your Script

6 PART PHONE SALES SCRIPT FRAMEWORK



Step 3 – Establishing Credibility

Quickly establish who you are, and why you are credible. (**Hint:** You can do this by differentiating yourself from your competition.)

Your Script

Step 4 – Making Your Offer

- Lead with your call's objective.
- Keep the conversation focused on how your product or service is going to help the prospect solve a significant problem.



Your Script

6 PART PHONE SALES SCRIPT FRAMEWORK



Step 5 – Getting A Commitment

- If the opportunity for closing a deal presents itself during your conversation, pull the trigger and go for it.
- Avoid vagaries like, "When are you available?"

Your Script

Step 6 – Ending Your Sales Call



- Thank them for their time.
- Confirm the time and date of the next meeting.
- Ask them if there is anyone else who should join the meeting. Get as many decision-makers to join in the meeting.
- Tell the prospect what you want them to do next.

Your Script

CONNECT WITH US /

TAKE YOUR SELLING SKILLS TO THE NEXT LEVEL!

If you have been inspired by this programme, why not take your development to the next level? To learn more about our motivational sales keynotes, team role-profiling, coaching, sales workshops, sales leadership training, train-the trainer certification and licensing online course as well as books and other support tools, please connect with us!

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