



COLD CALLS & ELEVATOR PITCHES: SECRETS TO MAKING A GOOD FIRST IMPRESSION IN SOFTWARE SALES

Presented by:
Joe Brannon, Founder & CEO at textLIVING





ROAD MAP

Best Practices for Cold Calls and Elevator Pitches

The Prospect Visit

Real-World Case Studies for Merchant Success



BEST PRACTICES FOR COLD CALLS AND ELEVATOR PITCHES

STRUCTURE OF COLD CALL + TIPS

STEP 1: GREETING

Get to the point quickly

STEP 2: REASON FOR YOUR CALL

Be natural, confident, and concise

STEP 3: FOLLOW-UP QUESTIONS

Questions are the best way to start an engaging conversation and get buy-in from the prospect

STEP 4: MANAGE REBUTTALS

Listen, acknowledge, and follow up with questions

STEP 5: GET THE WIN

Schedule a visit with the prospect

PROSPECT VISIT

3 KEY PIECES OF INFORMATION TO SHARE

State Agenda

- Start the meeting off by giving the prospect a brief roadmap of your time together.

PROSPECT VISIT

3 KEY PIECES OF INFORMATION TO SHARE

Pre-Presentation Questions

- Ask thought-provoking questions that will lead your prospect to discover they need your product when you start presenting solutions.
- People love to buy but don't like to be sold.
- Try and tell a story about their business to set up the questions.
- For example, let's say I'm meeting with The Catfish House... I would ask a question like this: Mr. Prospect, let's say I come to your Catfish House, the food is terrific and the service is spectacular, but for whatever reason I fail to come back for 30 days. Do you have a way to automatically send me a personalized text with a small offer inviting me back? (Most of the time the answer is no.) Do you think that would add value to your business?

PROSPECT VISIT

3 KEY PIECES OF INFORMATION TO SHARE

Present Specific Data Tailored to Prospect

- When going through your product presentation, present specific data based on what you learned from your pre-presentation questions.

PHONE PROSPECTING PROCESS

The following process is used by our sales reps when phone prospecting. We recommend using a CRM to manage your prospect and customer relationships.

- Create a company and contact in CRM. We use Hubspot.
- Call through the CRM. This logs the call automatically and records the call, which provides great coaching opportunities.
- Use the structure of a cold call to schedule a visit if you connect with a decision-maker. If you don't connect, ask for the owner's e-mail and cell phone number so you can send a text and e-mail.
- Send text and e-mail and create a follow-up task for yourself in CRM.
- Once the meeting is confirmed, invite the owner by scheduling a meeting through CRM.
- Create deal and deal value in CRM.



Real-World Case Studies of Merchant Success

The following case studies are resources you can share during cold calls or presentations for real-world examples of merchants who have proven success using our platform.

CASE STUDY 1

El Mazatlan Mexican Restaurant has seven total locations on our platform.

In the first 60 days, we utilized automated texts and generated an estimated total revenue of \$15,466.

Since joining the platform, we have helped them generate \$412,000 in revenue through loyalty and text marketing efforts.



CASE STUDY 2

Clothing Boutique

Within the first year of joining our platform:

- 2,186 customers signed up for the shop's loyalty program
- The merchant sent 58,576 texts and saw their customers check in 5,949 times using the kiosk

By the end of their second year:

- The merchant doubled their total subscribers to 3,822
- Customers checked in 13,465 times
- Buyers redeemed loyalty offers 667 times



CASE STUDY 3

Frozen Yogurt Shop

Needed a simple way to retain customers who stopped visiting or weren't visiting often.

- Used the kiosk platform, loyalty program, and automated text feature

Results over 2.5 years:

Total Redemptions: 4,044

Estimated Additional Revenue: \$20,220



MASTERING THE DEMO: TIPS FOR PRESENTING SOFTWARE TO POTENTIAL CLIENTS

Practice Makes Perfect

Practicing your demo is an important first step to getting familiar with the software and ensuring a smooth presentation. It's also important to realize that you'll never perfect the demo without learning from real-world interactions.

Embracing a mindset of constant growth and development is paramount in the world of sales, particularly when it comes to delivering compelling software demos. Certain skills and tactics can only be acquired through firsthand experience and genuine customer engagement. Over time, you'll be able to anticipate potential questions or issues and have appropriate responses at the ready.

MASTERING THE DEMO: TIPS FOR PRESENTING SOFTWARE TO POTENTIAL CLIENTS

Provide a Roadmap for Your Audience

Reduce your prospect's hesitancy by providing a quick agenda at the beginning of the meeting. By equipping them with a roadmap for the demo, you'll offer a preview of what they can expect and how much time it might take. When you're both on the same page, you'll increase trust and buy-in for the duration of your meeting.

MASTERING THE DEMO: TIPS FOR PRESENTING SOFTWARE TO POTENTIAL CLIENTS

Ask Your Prospect Questions

Asking questions early on in a demo can help you understand more about your target's business, marketing strategy, and what's working or not working for them. These questions can provide valuable insights you can use during the demo to speak directly to their needs and goals.

MASTERING THE DEMO: TIPS FOR PRESENTING SOFTWARE TO POTENTIAL CLIENTS

Gently Guide Your Prospect

Encourage questions and engagement, but politely redirect the conversation back to the planned agenda if it shows signs of veering off track. Occasional conversational detours are great, but it's essential to stay to make sure you reach your final destination: the sale.

- [Check out this blog article](#) for additional proven strategies that will empower you to deliver engaging and persuasive software demos.

MORE RESOURCES TO EXPLORE

- [Watch this video for additional tips on how to successfully perform a new prospect meeting as a white-label loyalty and SMS platform partner.](#)
- [Explore our entire library of resources.](#)



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