

Cold Call Checklist

Did the producer?

- Demonstrate proper preparation before picking up the phone?
- Remain energetic and upbeat throughout the call?
- Limit information shared with call screeners?
- Open the call by clearly introducing yourself, your agency, and the purpose of the call?
- State a benefit or ask a question to promote interest or engagement?
- Clarify and effectively respond to at least the first objection raised during the call?
- Close on a specific request?