



A Powerful Sales Conversions Process For Inbound Leads - The Get Clients Series



When leads reply in the positive to your cold email, what are the next steps towards conversion? Growth Labz' Will Wang shares more of his cold outreach expertise.



Will Wang

James: James Schramko here, welcome back to SuperFastBusiness.com. This is Episode 624. I've brought back my guest from [The Get Clients Series](#). Welcome, Will Wang.

Will: Thanks for having me back, James.

James: We're making some good progress in this series. We've covered a couple of topics in the past. [We've talked about cold outreach](#) that we did an overview in Episode 610. In 613, [we talked about how to use emails for cold outreach in particular](#).

So here we are today. And we're going to talk about a little bit down that path of what happens next, when our campaign starts to work. What do we actually send people and how do we increase your conversions on these leads? And I think this is such a critical topic, because if you speak to anyone who's engaged an agency before, I imagine you're going to hear stories of they've set up a campaign, they've run it, and then they didn't get the return on investment they wanted.

And there's so many critical factors there, from who they're targeting, what message they're sending, which medium they're using to send the message. And then, of course, what happens after that initial contact is established. And I think this is actually super critical. And I know some people who have created multiple millions of dollars a year by focusing just on this part, what happens when that phone calls to the reception or when the email gets sent back in the emails with a reply to that first email. So let's zoom in on this part of the process. And certainly, Will, I'm interested to know if you think this is as important as I do.

Will: Yeah, it totally is. I mean there's a lot of people out there who their focus is on just leads, leads, leads. But the last time I checked, and the last time I went to the bank, you can't really pay a mortgage with leads, right? You've got to turn them into actual, paying clients. So there's a whole other process behind it. And in a system that we use and that mentality that we have, which is a little bit different to attracting the leads in the first place. So we really get to dive into that topic today.

James: Right. So what sort of replies are we getting? Like, let's talk about where does this part of the journey start? Imagine we've set up a campaign, we did the things you suggested in our [previous episode](#), we've got the right message to the right person, we've set up our own email sending out facility that's going to give us a good, clean, send history, and now we're starting to get replies. What are people actually replying to?

Will: Yeah, so we've got to go to the copy of the emails a little bit, because there's a couple of things that really stops a lead from turning into a client, and we'll kind of break it down.

What are you asking them to do?

So the first thing to look at is, what you're actually asking the leads, or the contacts you've got, to do. Now a lot of people come through and they just go straight for the kill, right? They say, "Hey, can I have an hour of your time?" "Can I have half an hour?" And these are people who haven't heard of you, who don't know you, who don't trust you. Going into a pitch straightaway is something that kind of really hard to do. And unless they've got a huge problem, it's really hard to kind of get them on the phone for that.

So it kind of goes back towards copy, and that's why the whole process has to kind of link together and flow really smoothly and really seamlessly. So the first step would be on the copy itself, on the email itself, just understand what you're trying to ask for. So when we help clients with this, you know, when we advise other companies on how to do this, we typically get the emails going where we ask for a 10-to-15-minute call. And the reason why we do that is we want to build this whole sales process from them not hearing of us, to having a call with us, to go into a pitch and to ultimately becoming a client. We want that to become an easy sequence of yeses.

There's a whole bunch of psychology studies behind this, but the more you can get someone to say yes, for the process, the more agreeable they are. And hopefully they keep saying yes, until they actually pay the check.

It kind of comes back to the first step with emails. If we're asking for a 15-minute call and they say, yes, well then we've got to map out the rest of the process to get someone who is mildly interested, who may or may not actually even be qualified in the email, and how can we turn them into an actual client.

When they say “Yes”

So the next step after they say yes, is what we typically recommend is a quick 10-to-15-minute call. Now, this call is structured so that it's a positioning play, but it also makes sure that if you're about to take on a client, then you know that they're a good client for you, and you can actually do what you say you can do for them. So it's a 15-minute call where you qualify each other, you ask them a lot of questions about their business, what their goals are, and then look back at it and say, “Look, based on your goals and based on where you are now, I think I can help you.” Or, “I'm not sure if I can help you.” So we might not be the best partners to work with them. And then you can go through and help them build a plan that you can help them execute later on. So that's the first bit of it.

James: So when you're on that call, do you use a template?

Will: There's a template of questions that we generally look at. But really, it's all about building or understanding the client's expectations. So we'll start off by looking at where they are. Take, for example, within our agency, I'll look at a client and... oh, sorry, I'll look at the lead. And I'll just kind of get a feel for what they're expecting, like, what they're missing in their marketing mix. So if they're looking for something like SEO, well, hey, that's probably not my game, so I can refer them to someone else.

Whereas if they turn around and say, “We're looking for direct leads, because we want 50 leads a month. We're only getting 20 at the moment. We're not sure how to get the rest, or the 30.” Then that's when I say, “OK, let's break that down a little bit more. So you're on 20, you want to get to 50, what strategies have you got? What assets have you got?” And that's when we go through and start working out, seeing if we can feed into the jigsaw puzzle that they need in terms of the overall marketing.

How much proof?

James: And how much trust do you need to build, and how much proof do you have to offer? Because I imagine they've come at you from an email. So they may not have heard of you before, being a cold sort of program. Do you have any of those sort of elements built into what you call the pitch?

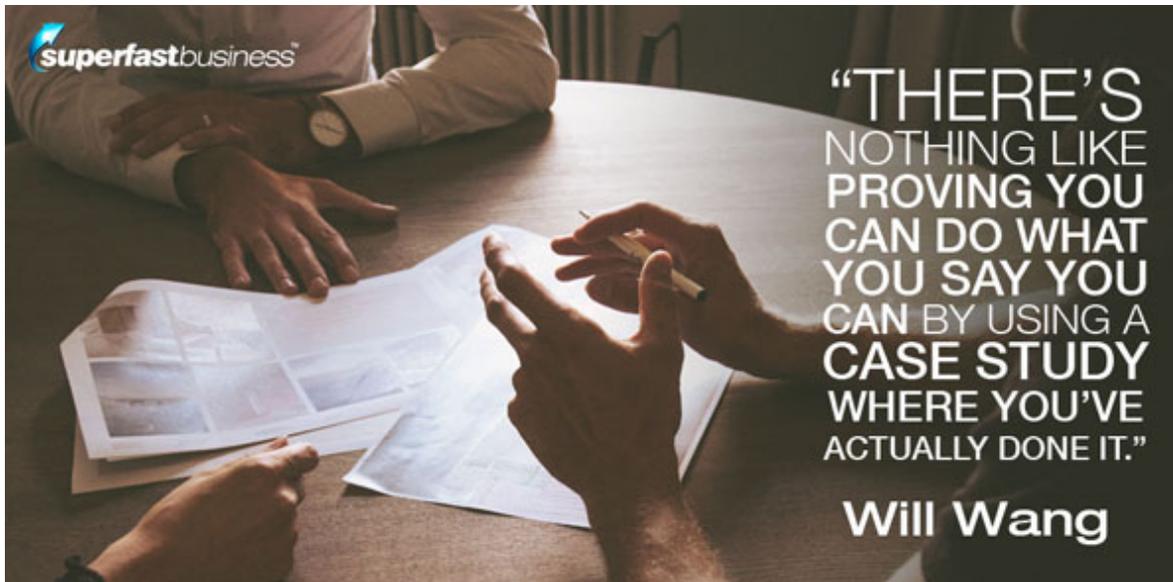
Will: Yeah. So the good thing about the qualifying call, and I'm kind of taking a step back, the reason that I'm doing it like this is because when I started my agency, I was literally stepping out of a corporate IT job where I didn't have to talk to anyone for probably, you know, weeks on end. So I was very introverted. I was very scared. I just wasn't comfortable with the whole process.

So the way that I kind of engineered the way that we do sales, and the way that we help our clients do sales, is just to make it super, super easy. There's no hard sell. And as part of that, the way that we kind of build the trust kind of goes into the point where I'm not pitching on that 15-minute call. But all I'm trying to do on that call is to ascertain whether we can help each other or whether we can work with each other. And I'll drop some quick information about, well, if I'm talking to someone that we've worked with in the same industry before, I'll tell them, "Hey, here's an idea that we've got from working with this other client." But the real goal or the main focus of that 15-minute call is to get the next phone call, which can be up to an hour, where you go for it and propose how you're actually going to help them.

James: So what do you call this call, Will?

Will: We typically call it a qualifying call. Or sometimes we call it a call to see if we're a good fit, which, I wish there was some sexy name for it, but that's kind of what we call it internally.

James: You know, I've seen different approaches for this. I've seen some people call it a brainstorm, other people call it a case study, where they go through a campaign they've already done for someone else, and that is the reason that someone would accept this in the first place. Certainly, sending a case study and then asking if they could hop on the phone to go through it is a pretty soft way to generate a collaboration there. And of course, if you can show and demonstrate that you've been able to get a result for someone just like the client, there's a good chance they might be interested in getting that result for them as well.



Will: Yeah, exactly. There's nothing like proving that you can do what you say you can by using a case study where you've actually done it.

James: Now, if you haven't got a case study, if you haven't got a result for the same type of client before, do you use an example from the market as, you know, like so many people do? If you read any business book, you'll get drippings of references to Warren Buffett, Richard Branson, Bill Gates, Jeff Bezos, and so on and so forth. Like, the list goes on. These people probably never met them, they're just citing something in history. Steve Jobs comes up a lot, for example.

So could you use a case study of what some company has done that wasn't actually your customer?

Will: Yeah, you can. But I'd be a little bit careful about that. Because the way that I approach these calls, sometimes I don't even use case studies on these 15-minute calls, because it's all about getting to understand the lead that you're trying to help. So if you use a wrong case study, or if you don't ask enough questions about what the business looks like, the types of lead that they're going after, you might be just using the wrong case study. And that's probably worse than not having a case study at all.

So the way that we kind of structured the call is, if it's a 15-minute call, we'll spend the first five minutes just asking the lead questions, and then really getting to understand them and what they're looking for. And then we'll try and apply the right case study, whether that's one that we've got ourselves, or whether that's something that we found in the market. It really depends on what they're looking for, and if the case study is even relevant or not.

James: That's such a good point, Will.

Actually getting it booked

I'm just curious - in your email that you send out, what are the actual words that you use to make this? Are you sending a link to a scheduler? Is it a reply to the email kind of call to action?

Will: Yeah, it's a great question, James. Because we've actually tested this. We found that it actually works a lot better just to get people to hit reply and tell us yes, and when they want to jump on the phone.

So we've tried the approach where we've had a link to other scheduling software like Calendly or ScheduleOnce, and we've seen that the reply kind of drops, or people, even if they say yes to getting a case study, or yes to a phone call, they never actually go in and book it. Now, I think the reason for that is, the more steps that you put in there between you and the lead and talking to them, the more chance there is of them dropping off.

So we typically, even if it takes us a couple of emails backwards and forwards to find a time, we find it to be a little bit better than just to just put the calendar link in there and leaving it up to them to go and book the call.

James: I agree. Very low friction. Do you actually go for that call straight up? Or do you do a few emails back and forth for that as well?

Will: We'll go for the call straight up. We'll go and ask for the 15-minute call straight up. And if that doesn't happen, so for example, we've got a five-email sequence, we might spend the first three emails asking for a call. And then if they haven't replied by the fourth or the fifth email, we might just change tack and just go, "Look, why don't we just send you a case study?"

So you know, we'd like to get the call first and foremost, but if it doesn't happen, there's kind of ways around that. And there's other ways that you can try and get into the leads' phonebook.

How long is a 15-minute call?

James: Yeah, that's nice. So how long do the 15-minute calls actually take? I know that's a ridiculous question because the time is in it, but that's like when someone says, I have just got a two-minute question and it goes for, like, 48 minutes later.

Will: Yeah, I've got a script that works really well for that. So the thing is, we come from the approach of, we want to treat the people that we're talking to with utmost respect, because literally, they don't know who we are, and they've just responded to an email and given us 15 minutes out of their day. And James, I mean, we kind of know that our time is the most precious thing that we have. So we always want to treat it with respect. And what I typically do is, if the conversation is going well, if it's flowing really, really well, and the people we're talking to are just giving us a whole bunch of information and not looking like they're stopping, I will actually stop - well, not stop the call. But I'll pause them at 15 minutes. And I'll say to them something like look, you know, Bob or Jane, I really appreciate your time and I want to be completely respectful of the time you've given me. So I know we're coming up to 15 minutes and I only asked for 15 minutes. I'm more than happy to keep going on the phone call if you've got the time and if you're happy to keep going, but you let me know what you want to do. If you're busy, we can find another time to keep this conversation going. But otherwise, I'm happy to just continue this phone call.

James: Yeah, that is respectful. I do like that about you, Will, you've got this whole approach is thinking about your perfect client and giving them a great experience, and every step of the way is relevant and courteous.

Won't I be bothering people?

And I imagine you're coming from a place where you're only doing this because you feel that there's a good chance you can help people with your product or service. So that might be probably one of the biggest obstacles I think for someone listening to this, thinking, well, I don't know if I could cold outreach. Won't I just be bothering people or annoying them?

Will: Yeah. And look, I completely get where they're coming from. Again, you know, I'm from an IT background. I was super shy, you know, really introverted, and it was really, really difficult for me to get used to the fact that hey, I can approach these people and ask them about their business.



But on the other side as well, if you've got a good product or a good service and you know for a fact that you can help these people with what they need, you've kind of got an obligation to help them, right? Because from my perspective as well, the way that I think about it is, there's a lot of agencies out there. Some of them do a great job, and some of them don't. So I know for a fact, the clients, or the leads rather, that I'm approaching, I know more or less that I can really, really help their business. So all I'm trying to do is just gauge if they've got a need for my services, if they really need the help that I can provide, and then ultimately see if we're a good fit to work together, and I can help them get those results.

So you know, I approach it very softly, I'm not looking to try to sell to them on the first phone call. I'm just looking to try and understand their business and their pains and the needs that they've got within their business. And hey, if I'm the right person to fill that gap, that's awesome. And if I'm not, I'm going to be 100 percent upfront and honest about that and help them some other way, whether it's information or referrals into someone else who can actually solve the problems that they've got.

The next objective

James: So just continuing that journey, you're on the 10-to-15-minute call, which literally goes for 10 to 15 minutes. At the end of that, you've indicated before that you might be moving towards a one-hour call as the next objective. Can you tell me more about that?

Will: Yeah, so the one-hour call, so people think that, from 15 minutes, it's just to kind of, just to put an extra step in there, but it really isn't. So what we do is, we build a lot of information and gain a lot of knowledge about the person that we're talking to and their business. So that all feeds into the one-hour call. So on the one-hour call is where we actually dive into the strategy and explain to the people we're talking to step-by-step, how we're going to help them solve the business problem they've got, and how we're going to move them from where they are to where they want to be. So that's more of a traditional proposal or pitch call, but we kind of frame it differently because we've got all of his great information from the leads. We can make it more about them and build a personal plan around it. So if we do it that way, it actually makes them saying yes to it a lot easier, because it's a plan that's been customized and built just for them.

A look at the numbers

James: And I'm interested, at these various stages, what sort of conversions are you seeing from email to appointment and then appointment to one-hour call and then one-hour call to customer?

Will: Yes, so, numbers... Look, I've got the exact number somewhere, but off the top of my head, we will get, the email sequences we write, we get typically a 30 percent reply rate on the emails that we send out. So if we send it to 100 people called, 30 of them will write an email back. Now, not all of them are saying yes, but you know, approximately from out of 100 people, maybe 15 to 20 of them would say, "Yeah, sure. I'm happy to jump on a phone call with you, just for 15 minutes."

So from that phone call, the next step that we look at is, we try and aim for a 50 percent conversion rate. Now, if you need more leads in your business, if you're more open to taking clients or you just need a whole bunch of more clients desperately, typically about 75 percent of those can actually go into the one-hour proposal call. But we kind of advice to get around 50 percent, because what that means is not only are your leads qualifying you out, but you're also qualifying out a few leads as well. So you're really being super open about who you're looking for, and just finding the right type of people to speak to.

So, 50 percent off the second call, which is 15 minutes, will go on to the longer proposal call. Of that one, look, it really depends on how your sales process, how good you are pitching, what your proposal looks like. But again, it can vary anywhere between 20 percent on the lower end up to 50 percent. You know, when we were kind of growing at the beginning, we were doing pretty good numbers. We were getting around 70 to 80 percent conversion rate from that one-hour call. But that being said, I felt like that was a bit too high, and we'd bring on too many of the wrong types of people. So 50 percent is a really good number to aim for.

The subject of word choice

James: Great. I've heard someone suggest a tip to, instead of using the word "proposal" to change that to "action plan", get a significantly better result. It sounds like exactly what you're talking about here.

Will: Yeah. So I mean, for the purposes of this conversation, and for the listeners who might be going for the process or have something similar, that's kind of why I say proposal, so they kind of understand where we're coming from. But as we go through, I never say to my clients, hey, this is a proposal. We go for a strategy, we call it a strategy deep dive, or a strategy session, where we're kind of walking through exactly how it works. So they understand it. Yes, it's a proposal, but the way that we frame it is well, yes, it is, but the proposal is framed around where you are and where you want to go and a specific strategy for your business.

A quick recap

James: Fantastic. Well, that's really comprehensive. So in terms of improving your conversions for inbound leads, just a quick recap where we've gotten to. You're sending out emails, you're asking for a 10-to-15-minute call, which is a positioning play that's helping you qualify and ensure good fit. You're looking for the people who you can actually help. The way you're doing that is simply asking them to reply back “Yes”, of which around 30 percent will do. And that leads you into that 10-to-15-minute call, where you get to talk about their goals and what sort of journey they're on, to get to the result that they'd like to get to. And about half of those people will agree to a 60-minute strategy session where you're going to go through an action plan with them. And somewhere between 20 to 50 percent of those people will end up being a customer. And that is how you increase your conversions.

Have I missed anything?

Will: No. Well, there's one little piece of the end which I don't think we'll have time to go into today, but it's the piece around using a CRM system and nurturing those leads who might have said yes but weren't the right fit or didn't jump on a call. But yeah, I think you wrapped it up really nicely, James.

James: Right. Well, that's the subject of our next episode. We're going to talk about lead nurturing with your CRM system.

Will Wang, this has been amazing. I appreciate you sharing this. If you want to find out more about this topic, you can head over to [GrowthLabz.com](https://www.growthlabz.com), and you can find out about what William Wang has got going on there. He helps businesses build out their marketing by getting more leads, basically. That's the nature of the series.

So, fantastic. Thank you for sharing again, Will, and I look forward to catching up on a future episode.

Will: Thanks so much for having me on, James. Always great to chat with you.

James: There you go. That was Will. You've been listening to SuperFastBusiness. I'm James Schramko.

Hey look, if you don't already have it, I suggest you grab my book. It's called [Work Less, Make More](#), and you'll discover how I've been able to set up SuperFastBusiness and spend my time interviewing brilliant guests and sharing these great topic ideas. It's available on Amazon or Audible and we'll catch up with you in a future episode.



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