

pipedrive



THE ULTIMATE GUIDE TO SETTING UP A CALL CENTER

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When it comes to sales, every conversation is an opportunity to engage a prospective buyer, to convert a prospect into a customer and to nurture client relationships.

Many of these conversations are over email, **but the most influential happen over the phone**. It's amazing how quickly you can learn the real reason a sale is stalled when people stop hiding behind text and start having emotional, human conversations.

However, that doesn't stop phone calls—establishing a meaningful relationship with a complete stranger—from being one of the hardest parts of any sales operation.

Sales leaders need to maximize the effectiveness of their sales team's phone time and cold-calling skills.

Knowledge, structure and similarity are the key ingredients to build a winning conversation formula. That means having the right team, training and technology in place.

In this guide we cover:

- ✓ **How to build a sales call center from scratch**
- ✓ **How to set sales calls objectives and measure success**
- ✓ **How to manage sales calls with Aircall and Pipedrive**
- ✓ **How to hire and train a winning sales call team**

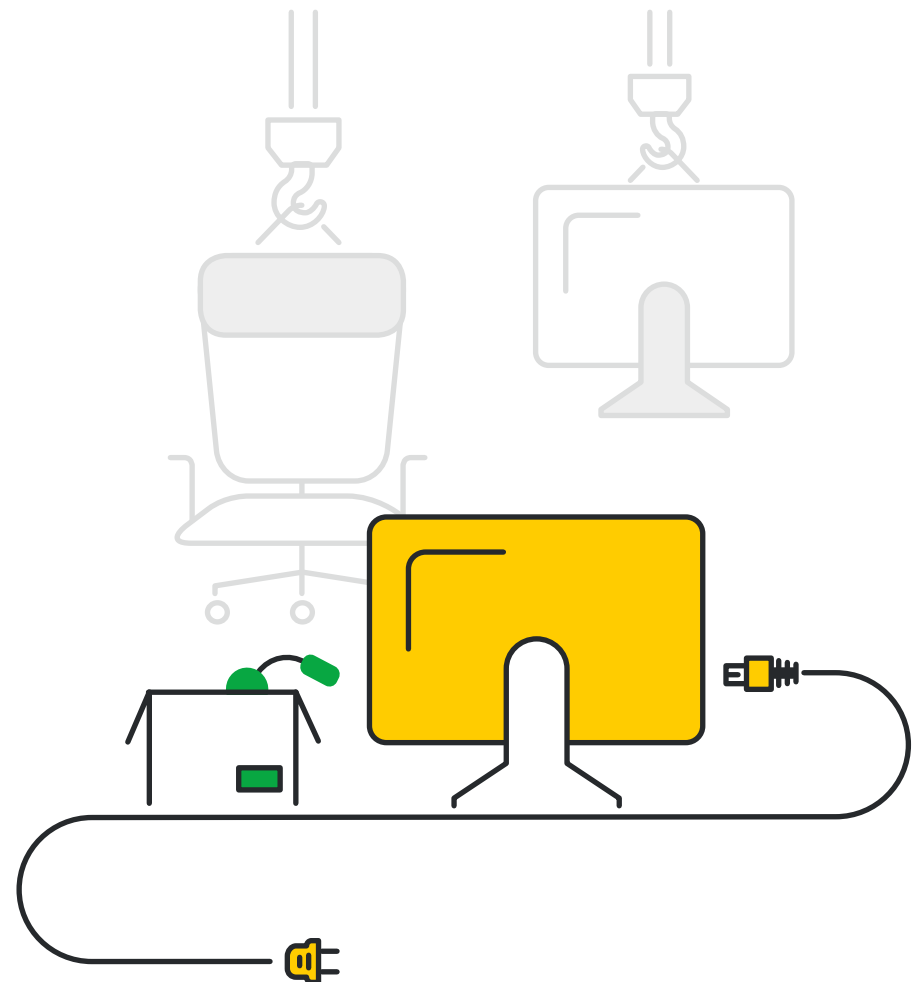
HOW TO BUILD A CALL CENTER FROM SCRATCH

Setting up a contact center that's guaranteed to drive long-term success requires a great deal of planning up front. This may seem tedious, or even off-putting, but trust us, it's essential if you want to dodge a heap of damage control down the line.

While the advent of cloud-based systems has made calls centers more affordable and accessible than ever before, it still requires an investment of both time and money. In order to make this effort worthwhile (and lucrative), you want to make sure you have a solid strategy and the necessary resources and technology in place.

73 percent of sales professionals use technology to close more deals.

Source: [LinkedIn State of Sales 2018](#)



KEY CONSIDERATIONS TO HELP YOU MAP OUT YOUR STRATEGY.

1. Crunch the numbers

Before setting up your call center, make sure you know the foundations. You should have some estimated figures up your sleeve:

- Estimated number of customers
- Estimated call volume
- Estimated number of call agents required to function efficiently

A firm gauge on these numbers and the size of the call center will help to inform your overall strategy, from recruitment to technology, and your office space needs. Errors or uncertainty at this stage of your planning could lead to costly and compounding consequences further down the track.

2. Plan the physical space

What kind of area can you work with? Your estimated number of reps will influence this decision, but you need to plan even further ahead.

The footprint is not the only consideration. Factor in noise, natural light and furniture to make sure you can create a productive, healthy and motivating workplace environment. Many businesses make the mistake of choosing chic industrial style rooms, only to find out that when twenty plus reps are making simultaneous calls, the echo is sabotaging their success.

Consider the acoustics of your room. If you don't plan for this upfront, you could be up for a costly refurbishment to fix the sound quality.



HELPFUL RESOURCES

Read through this guide to [Developing a Healthy Workplace in a High-Pressure Industry](#) for advice on creating an environment your team will enjoy.

3. Think of the money

How much can you afford to invest in your call center?

As well as hiring costs, choice of phone system and associated software, your budget needs to cover:

- The sound quality of the space
- Decent headsets
- Additional tools and integrations to ensure maximum efficiency

Consider everything up front. Factor in a little buffer zone so you can budget your sales call operations accurately and set manageable expectations. You don't want to start out with a team already under the pump because unexpected expenses have pushed your project over budget.

4. Visualize success

Outline your goals and KPIs early in order to choose a well-suited solution. There are two main areas to consider when setting up a call center:

Business goals and future growth

Future growth must be factored into the equation. Your call center will be a serious contributor to your bottom line. Your customer base is likely to grow and your call center will expand. This will impact your needs in terms of space and resources. Consider your hiring plan in the short and long term before you finalize your investment.

Specific objectives and KPIs for your team

Benchmark the performance of individual reps and your sales team as a whole, so you can make data-driven decisions to optimize your strategy and boost revenue.

5. Do you choose virtual or onsite technology?

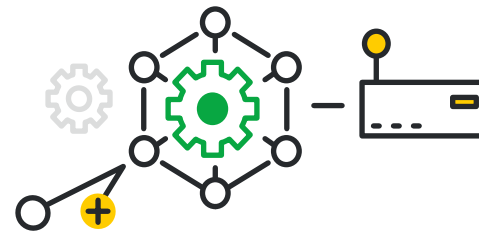
Where do you begin when choosing the right technology for your call center?

You need to match your hosting solution to your business needs. This comes down to your business needs and activities.



ONSITE

- This usually involves using a VoIP software through an IP PBX (An IP PBX is a private branch exchange or a telephone switching system within an enterprise that switches calls between VoIP users on local lines while allowing all users to share a certain number of external phone lines)
- Your business will be responsible for setting up, configuring and maintaining all of the infrastructure, hardware and software necessary
- This requires a lot of time, energy and funds up front
- Most technological problems can be dealt with in-house



VIRTUAL

- The responsibility for hardware and infrastructure will sit with your service provider
- You need to install the software and set a reliable internet connection
- It's simple to add new users and your reps can work from anywhere, anytime
- The software can be easily integrated with other tools

Overall, you need to choose a solution which is scalable, easy to implement and equipped to meet your business needs.

6. Find your all-star call center team

Call centers have a reputation for high turnover, so it's important to have a selective hiring process that focuses on the right candidates with long-term potential, as well as training that will help them reach it.

By selecting your sales reps carefully, it'll be easier to create a company culture that allows team members to excel and ensures customer growth and satisfaction.

7. Plan your entire sales toolkit

The trend towards a unified business interface is growing. A virtual system can integrate with your CRM software, your live chat or email service, your help desk and most other tools you need to work productively.

You don't want to be drowning in software, so try to keep to a small number of integrated tools that will simplify your processes and onboarding. Here is a shortlist of the major tools you should consider:

- Sales CRM
- Call monitoring software
- Internal communication tools
- Project management solution

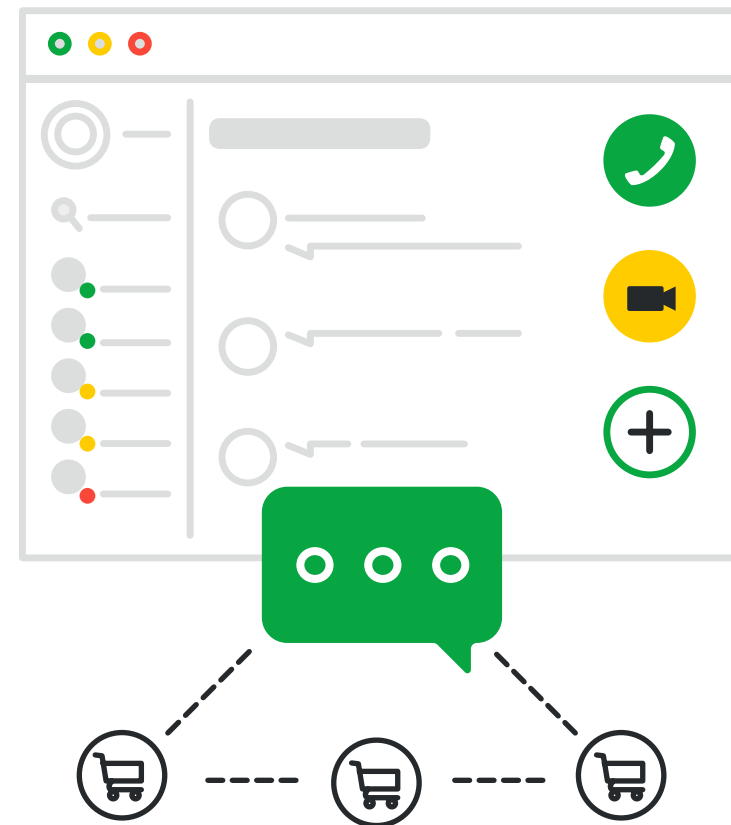
WHY CALLING SOFTWARE IS AN ESSENTIAL TOOL FOR ALL SALES TEAMS

Whether you have a team of two sales reps or two hundred, the benefits of sales call software cannot be ignored, particularly in relation to training and tracking performance.

Call recordings, live coaching, performance tracking and flexible analytics are invaluable to any sales leader charged with training and developing sales reps.

Whether you plan to build a call center or not, the following benefits make call software an invaluable tool for all sales teams.

Call software isn't just important for selling, but for training and development too.



Where can call software help any business looking to scale successfully?

Onboarding and training: Recordings are an Inside Sales team's greatest asset. Training sessions where managers can play back historic calls and give feedback allow the entire team to learn from each call made.

Performance tracking: Call result tags allow managers and operations leaders to track performance and diagnose what works and what doesn't, as well as monitor the effort of their reps each day.

Ongoing Coaching: Live coaching allows managers and trainers to help their reps during critical moments where deals are on the line.

Ongoing training and performance tracking are key assets to reduce employee turnover, enhance performance and, ultimately, drive more sales for your business.

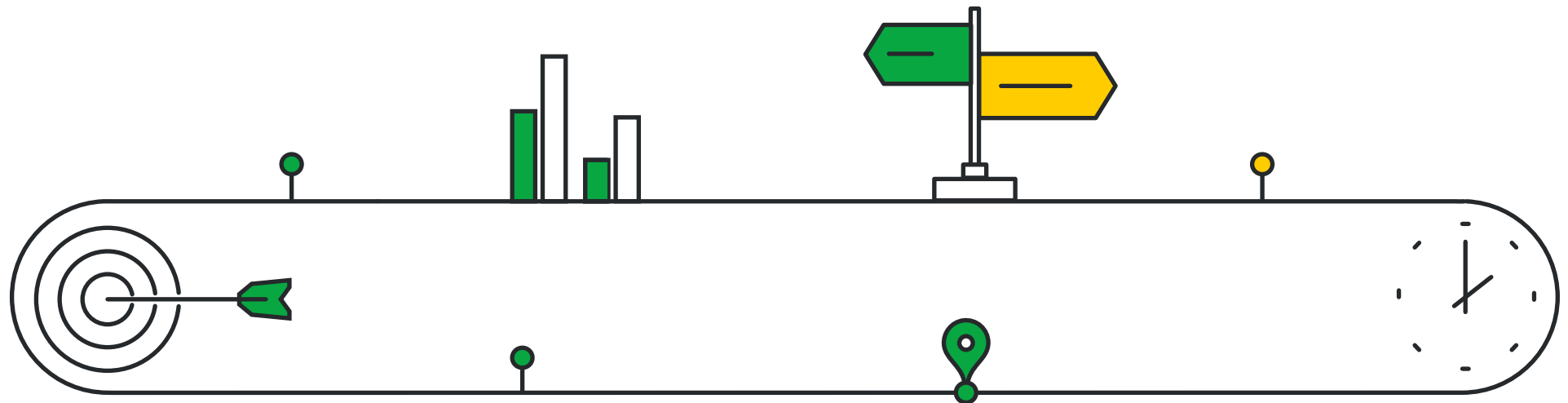
HOW TO SET SALES CALLING OBJECTIVES THAT DRIVE RESULTS FOR YOUR TEAM

Investing in the right software can only take you so far. You need to have a clearly defined vision of your end goal long before any of your reps start picking up the phone. This will likely be reworked and modified over time, but your strategy needs dedicated planning from the get-go.

Clear communication around goals and expectations is a must for sales teams. Without clearly defined goals, you lack a benchmark for success and your team is likely to lose momentum.

This is where **Key Performance Indicators, or KPIs, come into play.**

KPIs are quantitative measures of your call centers' efficiency, speed and quality of service. They are essential when it comes to assessing the success of your outbound call strategy.



Selecting KPIs for your call center

It's important for sales leaders to be selective when it comes to choosing what to measure. Benchmarking every KPI is not only a massive time sink, but it will yield an unmanageable amount of data.

Here are some KPIs to consider for your call center:

Average talk time

Target talk time will vary from business to business, but on average, if reps are working eight hours per day, they should be spending a minimum of four hours on the phone

Number of calls

The target number of calls a rep should make in a day

Percentage of engaged leads

This refers to quality talk time, when some kind of sales engagement took place such as moving the lead to the next stage of the buying cycle

Conversion rate

The percentage of deals you are closing

Take back control with activity-based selling

Of course, in sales, it's impossible to control every result, but you can control the inputs and the actions of your process. This means shifting your approach from results-based selling to activity-based selling.

In order to set these KPIs, you need to work backward from your previous sales performance to understand the average number of calls it takes to close a deal.

Look at a team member's past performance:

- **If it takes them 10 calls to make a sale, then their close rate is 10%.**
- **Now calculate how many calls they need to hit their target.**
- **If you want them to close 50 deals this year, they need to make 500 calls.**

- **Breaking that down into smaller targets means an average of 40 calls per month or 10 calls per week (taking leave into account of course)**

The key to keeping goals realistic and achievable is to understand the specific individual tasks it takes to achieve a sale and form activity-based targets.

By transforming goals into a series of manageable tasks, taking action becomes much easier and hitting targets suddenly feels so much more achievable.

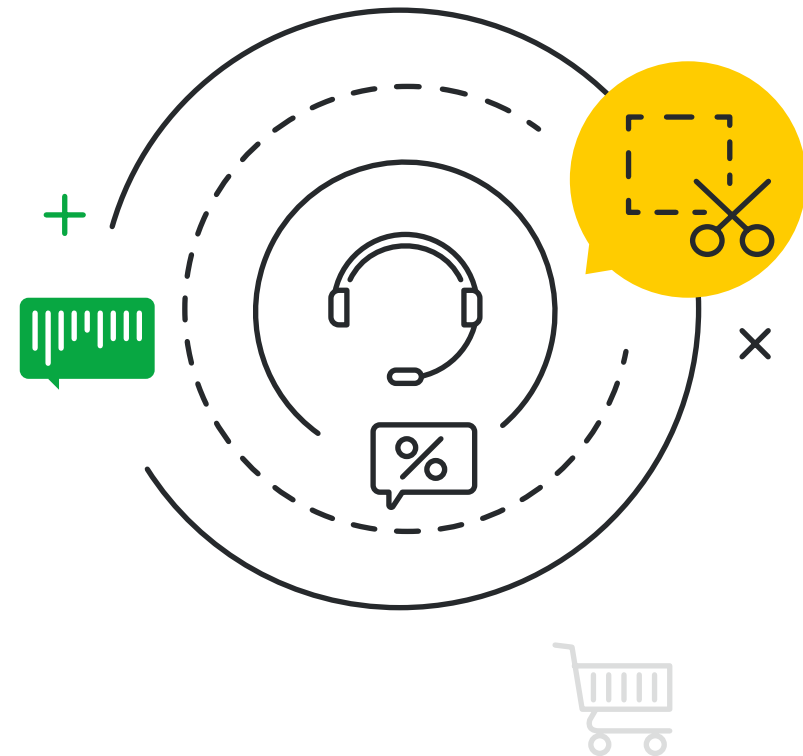
TRACKING, MEASURING AND OPTIMIZING YOUR SALES CALLING STRATEGY

To build a successful and repeatable conversation formula, you must have the right systems in place to **track your sales activities** in real time. A deep understanding of historical trends is key to repeat and scale the sales processes that drive success.

A cloud-based phone system will allow you to track conversations, analyze patterns and standardize the reasons for winning and losing on sales calls.

Here are some of the tracking features sales leaders should look for:

- Call recording
- Live performance monitoring during a call
- Real-time assistance
- Individual and team performance monitoring
- Missed calls, dropped calls and waiting time tracking
- Customer satisfaction through analysis of user habits
- An analytics dashboard logging all customer interactions



Optimizing your strategy comes down to constant reflection and improvement, which is why call recording and real-time monitoring are invaluable tools for sales leaders.

Successful sales leaders are fluid and reactive with their strategy and use data to constantly inform and optimize their sales process and goals.

- Set goals and build a strategy
- Evaluate performance and measure success
- Learn and optimize your strategy
- Build training and development slots into your team's workflow



HELPFUL RESOURCE

Download Pipedrive's [Psychological Selling Guide](#) and use these insights to train your team to understand cognitive biases. You'll be able to develop specific situations where your team can harness this knowledge of the cognitive biases of their prospects to their advantage in future sales conversations.

SUPERCHARGE YOUR SALES CALL PERFORMANCE WITH PIPEDRIVE AND AIRCALL

No matter how experienced or sales savvy your reps may be, even the greatest salespeople can't reach their full potential without the right tools.

If your sales process involves sales calls, cloud applications are a must to help you automate your workflow, scale your operations and make your reps' lives easier.

Introducing Aircall!

Aircall's cloud call center is specifically designed to help salespeople streamline their sales calling and supercharge conversions.

Pipedrive has a seamless [cross-platform integration with Aircall](#), offering a host of features that allow sales teams to effortlessly manage sales conversations from their CRM.

[The Pipedrive-Aircall integration](#) provides sales reps with all their contacts on the go, while call data is automatically stored and linked to contacts in their pipeline.



✓ **Combine Pipedrive and Aircall for sales calling mastery**

Pipedrive and Aircall are both built specifically to help ambitious sales teams scale fast and efficiently.

Here are just some of our favorite features to optimize call workflows, enhance productivity and inspire smarter conversations at every stage of your sales cycle.

✓ **Direct connection from Aircall softphone to Pipedrive**

Make phone calls directly from Pipedrive using Aircall's functions, so your reps' workflow is no longer interrupted.

✓ **Click-to-dial**

Calls can be launched from Pipedrive with a single click.

✓ **Call activities**

All inbound and outbound calls and voicemails can be logged as activities in Pipedrive.

✓ **Customer information sync**

Call details are automatically synced to the appropriate contact and the associated deal in Pipedrive. Records are automatically updated upon call completion.

✓ **Customer information pop-up**

Aircall's pop-up delivers key contact information to sales reps before they answer an inbound call to help personalize conversations.

✓ **Call recording**

Calls can be recorded to confirm details, monitor performance and provide ongoing training for sales reps.



PowerDialer

Numbers can be automatically detected and added from any webpage so sales reps can make calls in rapid succession and speed up their outreach.



Phone App

Sales reps can continue making calls on the go with phone apps for iOS and Android.



Call center analytics

All call information—such as tags, call volume, wait times and call recordings—are logged in Pipedrive so you can monitor and analyze sales performance in one centralized hub.



Live Feed

Sales managers can get real-time insight into the performance and activity of their team and individual reps to continuously optimize productivity.



Call monitoring

Live calls can be monitored to provide ongoing training and boost quality assurance.



Call whispering

Sales managers can speak to reps while on a sales call to offer timely advice.



HELPFUL RESOURCE

Watch this [quick intro video](#) to find out exactly how Pipedrive and Aircall's integration can speed up your call team workflows. If you're ready to install the integration, [Pipedrive's Marketplace](#) gives you step-by-step instructions (even if you don't have an existing account).

HOW TO HIRE AN ALL-STAR CALL CENTER TEAM

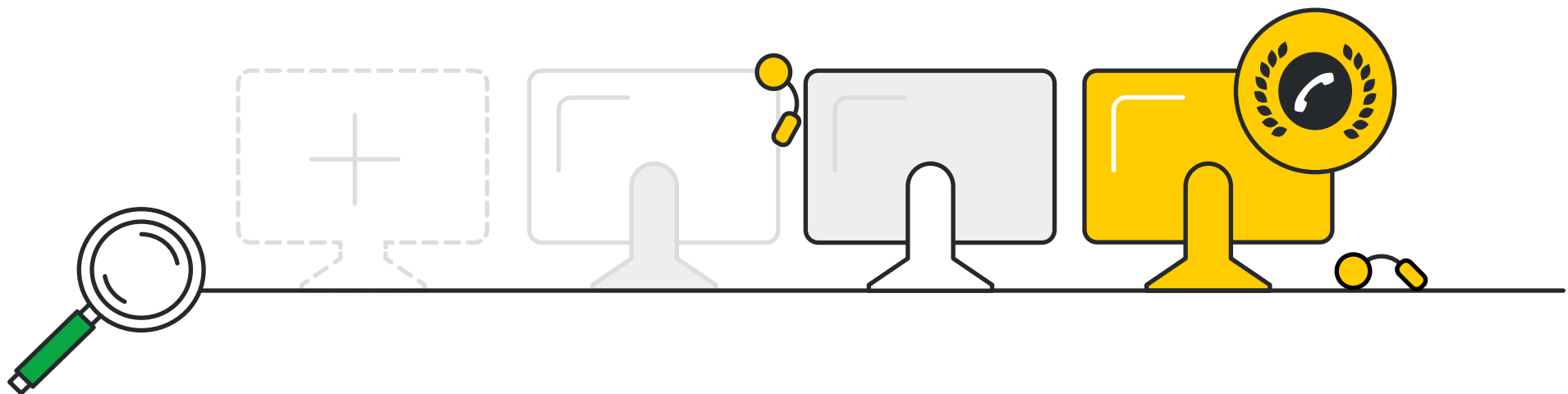
While calling software can boost the productivity of your team, it can't build customer relationships. This is your sales reps' opportunity to shine!

If you want to continue scaling the success of your business, you need an all-star sales call team to help you get there. Call centers are renowned for high-turnover, a fact that will not only

compromise sales, but also cost your company precious time and money too.

An air-tight hiring plan will help you find reps who are passionate, believe in your vision and are willing to work hard to achieve your long-term company goals.

To kick-start this process, you need to know exactly what you're looking for in your ideal sales call rep.



Top qualities to look for in your call center team

Teachability

While previous experience helps, someone who is open to learning and has a high aptitude is more valuable than someone who has spent five years on a sales call team with a bad attitude. Look for curiosity, open-mindedness and a willingness to follow a proven process.

Emotional intelligence

People buy for emotional reasons. That's why it's essential to find sales reps who can tap into the frustrations and needs of potential customers. Look for candidates who listen and display empathy.

Optimism

Failure is an inevitable part of the industry, so a sales rep needs fierce optimism: someone who will dust off the rejection and attack their next target with tenacity. Positivity is also essential to boost team morale. Negative attitudes can infect an entire sales team.

Communication skills

Look for candidates who are articulate and natural storytellers. They should be upbeat, polite, and convincing. It's also crucial that they like talking to people!



HELPFUL RESOURCE:

Don't just rely on finding and hiring skilled communicators. Sales pros should always be working on improving their relationship management skills. Download Pipedrive's [Sales Communication Handbook](#) and use this guide as a learning and development tool for your team.

How to interview potential call center candidates

Have a structured interview process in place before you begin to engage candidates. Here are some ideas:

The ice-breaker

Your first interaction should be an informal chat with the candidate. Include a series of personality-based questions to evaluate their soft skills and help you decide if the candidate in question is going to be a good cultural fit.

The team interview

The next stage of the interview process should be a more formal meeting. It's worth including other team members at this point to assess if they think the candidate will be a good fit for the team. Take this opportunity to ask more specific questions related to the candidate's experience and the role in question.

The sales test

While well-rehearsed interview tactics can get candidates through the first two stages, how they handle a tricky sales scenario is the real test. A mock sales call gives you the opportunity to evaluate how they perform under pressure. Rapport building, objection handling and listening skills can be assessed.



HELPFUL RESOURCE:

Consult our [Sales Interview Questions guide](#) to find a collection of the best questions to ask when searching for all-star candidates. You can even download our [Sales Interview Questions Checklist](#) to use during the recruitment process.

Call center sales roles

Call center sales roles are likely to vary from company to company depending on the specific needs and sales processes of the business.

Before you begin recruitment, it's vital that you have a thorough understanding of each role you're hiring for, and that put it in writing so candidates know exactly what they're signing up for.

Here's an overview of the kind of roles you should be hiring for:

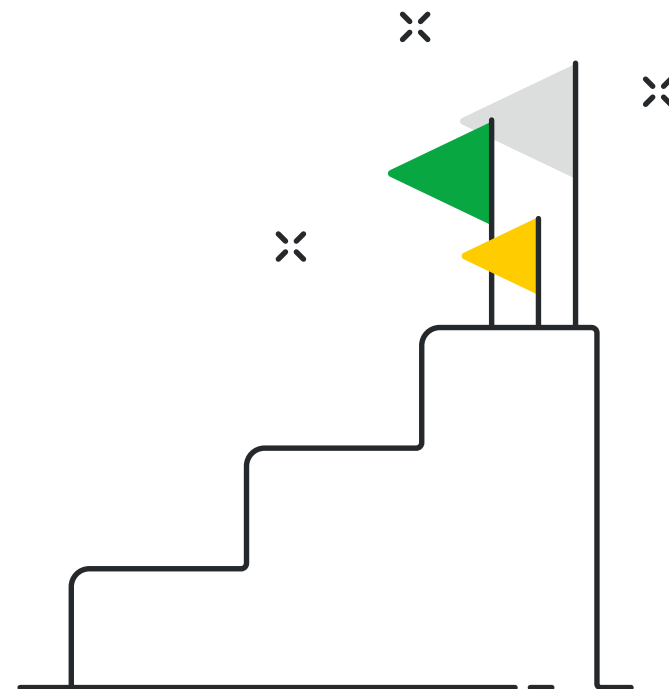
Sales Development Representative: Focused strictly on outreach to prospective customers. Their role is to engage potential buyers and connect them with Account Executives.

Account Executive: Focused on qualifying prospects, identifying their pain points, demonstrating how their product/service can provide value and closing deals.

Onboarding Specialist: Focused on getting new clients set up and helping them get off to a strong start with your product/service.

Customer Success Manager: Focused on managing the long-term relationship with the customer and growing the account through upsells and expansion.

Even if your hiring process is bringing in sales superstars, you can't expect your new starters to succeed without an equally effective [onboarding plan](#).



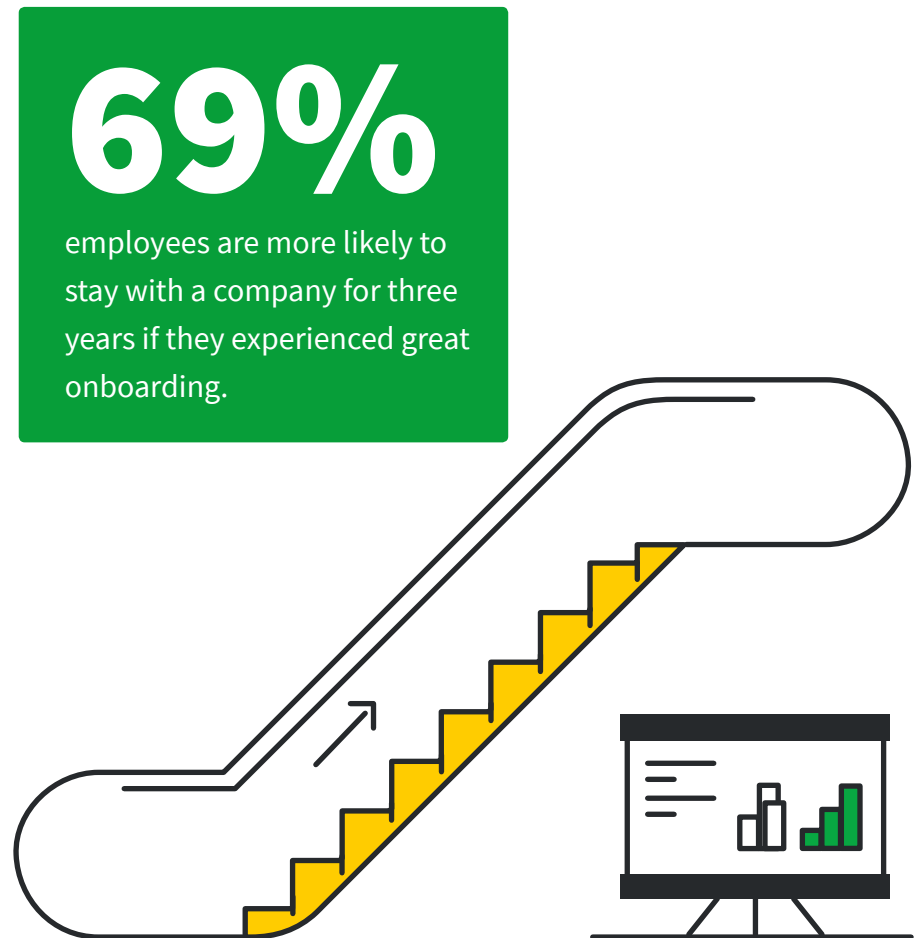
ONBOARDING AND TRAINING YOUR CALL CENTER SALES REPS

Onboarding your new recruits gives you an opportunity to empower them and give them the tools they need to succeed.

There are **three main focus areas** when it comes to ramping up new hires. The onboarding process should provide your new recruits with a thorough understanding of the following:

- ✓ Your expectations and their objectives in their new role.
- ✓ Your company and its core values—your sales team are your front line, so exhibiting the values of the company is a core part of their role.
- ✓ The company sales process and the activities they need to complete on a daily, weekly and monthly basis.

Source: [Onboarding New Employees: Maximizing Success](#), SHRM Foundation



Establish good habits and a consistent quality approach from day one with a uniform training program.

After all, if you don't invest in a comprehensive training program for new reps, it's impossible to get the most out of them.

So, how to get your sellers up to speed and hitting targets at the rate you need?

Practice makes perfect.

Encourage new hires to practice the sales script until it becomes second nature. Get them to rehearse in front of peers and role-play different scenarios to tackle common questions, competitive differentiation and objection handling.

Buddy up your new starters with best performers

Your new hires will have immediate access to inside information and helpful shortcuts and tips. It will also help them get comfortable in their new role.

Shadow sales calls

You want your reps to listen in on as many calls as possible during their onboarding period to learn how to deal with a wide range of sales scenarios. Aircall's call recording feature could be a key asset.



HELPFUL RESOURCE

The best sales call teams analyze what's working and double down fast. A consistent approach will allow you to test and optimize across the entire team. Cold Calling Templates will give you a good foundation. Download this collection of [customizable calling scripts](#) prepared and validated by Pipedrive sales experts.

Keep the curriculum engaging

Mix up the program with online learning, video coaching, peer-to-peer training and practical elements. Set key milestones and goals for your new reps to work towards each week to keep them motivated.

Become a product expert

Your onboarding program should include intensive product training. Your new reps need to be experts in your product set before they start manning the phones.

Empower new reps with the right tools

New hires need a tool that they can get the hang of in days, not weeks or months. Familiarizing reps with your phone system and CRM early will allow them to feel empowered from the offset.

Schedule regular one-to-ones

Scheduling weekly or bi-weekly one-to-ones are key to build relationships, review progress and discuss any challenges. Your new hires should value their manager as a mentor and sales coach.

A salesperson's training is never complete

High-performing sales organizations are twice as likely to provide ongoing training than low-performing ones.

Source: [SiriusDecisions State of Sales Onboarding Report](#)

Once your new candidate has settled and the onboarding process is complete, it's vital to keep them challenged and stimulated with ongoing training and development.

Encouraging your team to continually improve and grow professionally will result in a stronger performance.



HELPFUL RESOURCE

Developing the best sales talent in your industry is a monumental strategic challenge. But this could be the reason you're making a profit in 10 years time. Aircall takes you inside [7 of the toughest sales skills to teach](#) to help you get a jump on your competitors and turn your team into superstars.

Sales calling tips to enhance your reps' phone skills

Research your prospect

Armed with the right information, your reps can demonstrate their knowledge and interest with informed questions. This builds a greater sense of trust and reassurance, which leads to better conversations and more deals closing.

Plan your questions

Reps should plan the specific questions to ask on the [sales call](#). The right questions don't just uncover useful information, they get the prospect involved and demonstrate that you're genuinely interested in understanding his or her pain-points.

Establish your goal for the call

Depending on where your prospect is in the sales cycle, your goal may be to understand the prospect's workflow, schedule the next interaction or to get hold of a key decision maker. Once you establish your ideal outcome, you can begin to understand the steps you need to take in order to reach it.

Practice active listening

This is a key communication technique that your reps should continually work to improve. Active listening is the practice of listening to a speaker while providing feedback, indicating that you truly hear and understand what the speaker is saying. Effective active listening should help to achieve the following:

- Acknowledge the speaker's value
- Encourage the speaker to elaborate on their thoughts
- Create an empathetic bond with the speaker

Leverage cognitive biases to make prospects want what you're selling

A solid understanding of how and why people make decisions is a powerful sales tool when persuading our prospects and directing them along the path to purchase. Here are some of the key **cognitive biases** to capitalize on during your sales calls.

THE ANCHORING EFFECT

What is it? Our inbuilt bias gives more weight to the first piece of information we receive and then we use that information as a base for subsequent decisions.

Key takeaway: The first thing you say matters. Understand what your prospect needs as a solution before you start highlighting features and benefits, and hook them with the right information from the offset.

THE AMBIGUITY EFFECT

What is it? The ambiguity effect causes us to lean towards the familiar and mistrust what we don't fully understand.

Key takeaway: Don't overload your prospect with information on your first call and avoid jargon, acronyms or technical terms. Simplify your proposition and tell a compelling story.

THE BANDWAGON EFFECT

What is it? Your prospect's susceptibility to trust social proof.

Key takeaway: Don't be afraid to talk about your customers and their experience. Leverage case studies and real customer stories to demonstrate how your prospect's peers are using your offering.

THE CONFIRMATION EFFECT

What is it? The tendency to jump to conclusions that confirm our preconceptions.

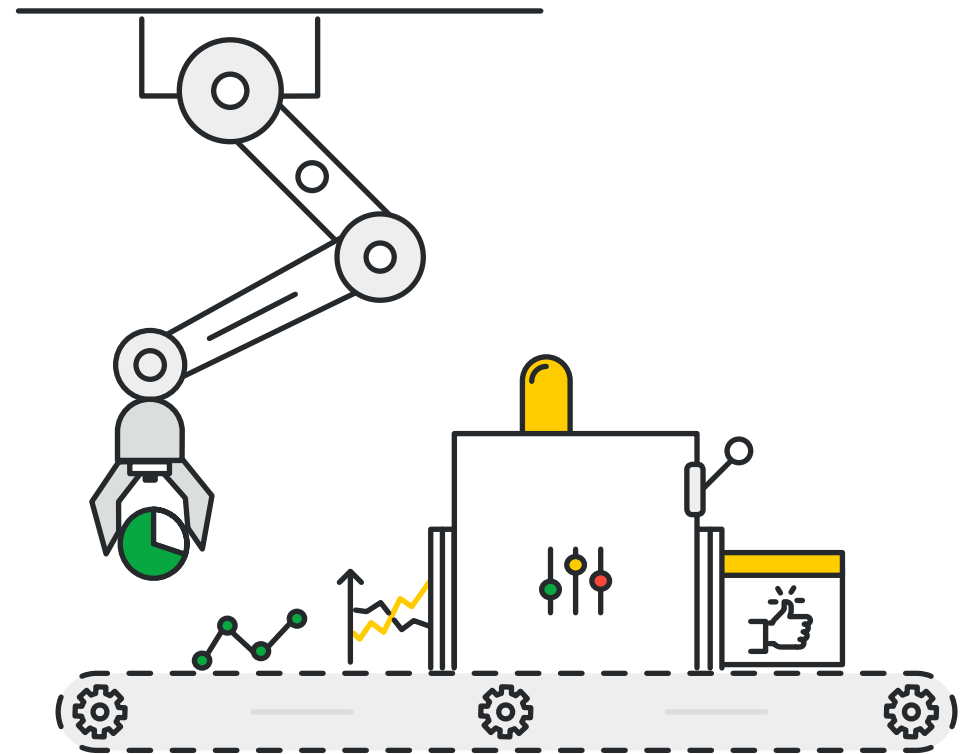
Key takeaway: Use your discovery call to ask guiding questions that help you to understand your prospect's point of view. Use this insight to share information that confirms your prospects thoughts to move them along the path to purchase.

TURNING SALES REPORTS INTO PERFORMANCE IMPROVEMENTS

One of the most important elements of ongoing training and development is the ability to track, analyze and enhance your sales team's performance. This involves a constant cycle of learning and using data to inform processes. Call center monitoring involves a constant cycle of data collection, analysis and feedback.

Pipedrive's customizable analytics dashboard, combined with the wealth of call data that Aircall generates, provides a powerful learning tool for sales managers and reps. This allows you to keep track of valuable information at every step of the sales process so you can assess call quality and identify patterns to standardize the reasons for winning and losing opportunities.

Having a simple, visual overview of your data and the ability to play back historic calls removes the guesswork and gives you a clear view of where your company stands at every stage of your sales process.



Focusing on measurable activities that have clear outcomes will allow you to add more value to individual sales reps and your company as a whole.

- ✓ Make sure you keep your sales reports simple and easy-to-use for reps with all levels of experience
- ✓ Canvas each of your reps to make sure they understand your reporting and know how to put your insights into practical action
- ✓ Use team meetings to reflect on your findings and have your reps share best practices
- ✓ Make the learning process more interactive by having your reps evaluate one another's calls
- ✓ Introduce an element of gamification by highlighting the best-rated call on a weekly or monthly basis
- ✓ Conduct regular one-to-one performance reviews to highlight individual strengths and tackle weaknesses

Get a clearer understanding of where to focus your sales team's efforts and how to address any gaps or weakness in your call center.

Establishing a successful sales call center requires dedicated planning, careful execution, and a willingness to constantly grow and improve.

Here are a few key points to keep front of mind to truly master the foundations of your call center.

Plan, plan, plan!

Account for plenty of planning time up front. Setting up a call center requires a comprehensive strategy that covers everything from your phone system to the physical space for your call center team.

Establish your goals.

Outline your business goals and KPIs early to make sure you choose a scalable solution for your call center.

Consider a cloud-based phone system that automates workflows and boosts productivity.

Investing in virtual calling software like Aircall isn't just important for driving sales, but for the training and development of your sales team too.

Find and invest in the best talent.

Call centers are renowned for high turnover, so you need an air-tight hiring plan and a comprehensive onboarding program to improve employee retention.

Never stop learning.

Ongoing training and development are key to keep your call center reps challenged and stimulated.

Leverage data to enhance performance.

The most successful call center managers have a structured reporting process and employ a constant cycle of testing, learning and optimizing sales calling workflows.

If you want to leverage data, automate workflows and track the impact of your phone conversations, you need a CRM.

Pipedrive empowers sales teams with over [150 Marketplace integrations](#), including Aircall, so you can make sure that you don't miss out on any valuable data. The many automations make sure that your sales team can focus on optimizing their calls to convert prospects and build strong, long-lasting relationships.

Don't have a Pipedrive account, yet?

Start your 14-day free trial today and find out how 80,000+ sales teams use Pipedrive to slash admin time and focus on what they do best.

