TAILWIND FIELD GUIDES

Start a sales call without rushing the pitch.

Four steps to start a prospecting call, explore a relevant problem, and agree on what happens next.

4 steps | 7 minute read Includes a practical worksheet

Joe Ippolito built his own sales-training business by making cold calls. Tim Roberts, principal at Sandler Training–Trustpointe, brings 28 years of experience to the conversation. Both tackle a familiar challenge: you've interrupted someone's day, and you need to give them a reason to talk before launching into what you sell.

In this guide, we take excerpts from our interviews with these two sales pros to walk through a prospecting call in four practical steps. You'll learn how to introduce a relevant problem, make the opening easy to answer, follow what the person actually says, and agree on what happens next.

Read on, then use the accompanying worksheet to prepare your next call. You'll have a reason to reach out, an opening you can say naturally, a useful follow-up question, and a clear next move.

01 Find the reason
02 Ask for a moment
03 Follow the answer
04 Agree what's next

01 Start with a problem they might recognize.

Which problem would make someone care? Tim hears sellers fall back on quality, service, and expertise. Buyers hear those claims all day. His customer stories describe what was going wrong and why it mattered.

> “Think about why people choose you.”
>
> **Tim Roberts**
> Principal, Sandler Training–Trustpointe

Get specific. A team struggling to assign incoming jobs has something to discuss. A claim about powerful scheduling features gives them more to decode.

Use a story you can support. For example, a founding AE can ask the founder what customers actually said before buying. If you’re a founder without customer stories yet, start with a relevant observation and a question. Don’t borrow someone else’s results and present them as yours.

Watch Tim explain why generic claims fall flat ↗

In our interview, Tim contrasts familiar sales claims with stories that help buyers recognize their own situation. Use that distinction to sharpen your reason for calling.

From Topsail’s interview with Tim Roberts

57 seconds · Opens on YouTube at 23:52; watch to 24:49.

Give the call a reason

- Write one problem you can help with and the evidence that makes it worth asking about.
- Separate what you know from what you still need to learn.

You’re ready when: You can explain why this person is worth calling without assuming they need you.

That research takes time. **Topsail ONE brings prepared company and contact context into your daily work**. You decide what to ask.

02 Make the opening easy to answer.

Joe acknowledges that they haven't spoken and asks for a moment to explain the call. The person gets a choice before he continues. Ask, then stop talking.

WORKED EXAMPLE

Turn growth into a useful question

Fictional example: Maya sells scheduling software at Routewise. A prospect's job posting mentions two new service locations. She knows they're growing. She doesn't know how their scheduling works.

Name, purpose, permission

"Hi Sam, it's Maya at Routewise. We make scheduling software for service teams. We haven't spoken before. Can I take a minute to explain why I called?"

Connect the observation

If Sam agrees: "Your dispatcher posting mentions two new locations. I wondered whether keeping job changes straight across teams has become harder, or whether that's running smoothly?" The question leaves room for either answer.

If Sam declines, thank them and end the call. The permission needs to be real.

An editorial example applying the interviews, not a guest script or a customer result.

Watch Joe unpack the permission in his opening ↗

Joe explains conversational tone and the prospect's choice to continue. Use it to check that your opening gives the other person a real choice.

From Topsail's interview with Joe Ippolito

42 seconds · Opens on YouTube at 17:05; watch to 17:47.

Try the opening aloud

- Say who you are, why you're calling, and ask for a moment.
- Pause long enough for the person to answer.

You're ready when: The opening sounds like you, and the other person can decline.

03 Ask enough to understand what matters.

Someone mentions a problem. It's tempting to jump straight to the feature that fixes it. Joe keeps a different question in mind:

> "does this person have a problem that I could potentially solve?"
>
> **Joe Ippolito**
> Principal, Topline Performance Solutions

Continue the fictional call. Sam says, "Dispatchers call each branch to check changes." Maya asks, "What happens when a change gets missed?" Sam replies, "We send someone to the wrong site and lose half an hour." Now she has an impact to explore. She still doesn't know whether Routewise would solve it.

If Sam says the extra calls work fine, don't manufacture urgency. Ask whether anything about the process needs attention. If not, there may be no reason to continue.

Tim's advice on practice matters here: learn the approach in your own voice. Rehearse with someone who gives different answers. You're practicing listening as much as speaking.

Watch Joe replace the pitch with curiosity ↗

Joe describes what he wants to learn before asking for a meeting: a problem, challenge, or goal related to what he can help with.

From Topsail's interview with Joe Ippolito
51 seconds · Opens on YouTube at 9:36; watch to 10:27.

Have a question ready, then listen

- Write one question about what the problem affects.
- Record their answer in their words. Use it to choose the next question.

You're ready when: You can explain what matters to them without filling in the gaps yourself.

04 Give the conversation somewhere to go.

Joe's three-minute reminder is a cue to arrange a fuller conversation once you understand a relevant problem and its impact. It isn't a hard stop. Tim makes room for an honest no, too.

Worth exploring	Bad timing	No fit or interest
Agree a meeting purpose and time.	Ask whether and when a callback would help.	Thank them, end the call, and respect a stop request.

In the example, Maya asks, "Would 20 minutes help us look at those missed changes and see whether we can help?" Sam agrees to Thursday at 10. They confirm the time zone; Maya will send an invitation with that purpose.

Watch Joe suggest a focused next meeting ↗

Joe explains his three-minute reminder, then offers a meeting to explore the problem without presuming a sale.

From Topsail's interview with Joe Ippolito

1 minute 36 seconds · Opens on YouTube at 28:18; watch to 29:54.

Close the loop

- Record the outcome, agreed action, owner, and time.
- If there's no fit or they ask you to stop, record that outcome.

You're ready when: You can name the next action and its purpose, or why the conversation ends here.

Ready to make the call?

Give the conversation a quick check.

Before you start
☐ I have a supported reason to call and a question to check it.
☐ I've written an opening that gives them a real choice.
☐ I have an impact question and space to record their answer.
☐ I know when to suggest a meeting, agree a callback, or stop.

Download the worksheet ↓

One-page, fillable PDF · No email required

Topsail ONE prepares the contacts and organizes the next steps. You make the outreach and have the conversations.

THE CONVERSATIONS BEHIND THE GUIDE

Keep listening with Tailwind.

Tailwind brings the conversations and expertise. Field Guides turn those insights into practical resources you can use.

Tim Roberts

Replace Generic Sales Claims with a Recognizable Buyer Problem

Joe Ippolito

Create Curiosity in the First Moments of a Cold Call