

Master the Art of the Soft Transfer for Qualified Leads

Tuesday, February 23, 2021 - Written by: [Jeff Kalter](#)



As your sales reps take on the front lines of selling, who's doing your lead qualification?

Think about this when you sign up for a live transfer service. Inbound "sales" calls potentially can convert ten times better than clicks, but are you sure that you're getting highly qualified leads that your reps can act on? Or are you buying a glorified answering service?

Live Lead Transfer Just Another Form of Lead Gen

So why am I opposed to live transfer? After all, it means reps don't have to spend their time cold calling. They don't have to leave countless voicemails, many of

which won't be returned.

What's more, live transfer ensures that someone responds when a call comes in and immediately transfers it to a company sales rep. And we all know from James Oldroyd's research about the importance of a quick lead response time.

But what sounds good on paper is missing one critical element. In all the effort to make a speedy transfer, little attention is given to lead qualification. So, while your sales reps may be able to strike while the call is hot, they are in the dark. They don't know anything about a potential prospect's pain points, whether their company has a good solution to meet a lead's needs or whether the person calling is even a decision-maker.

Without taking the time for lead qualification, the live transfer is essentially a blind transfer.

And what if no rep is available to take the call when transferred? Then even the advantage of speedy response management is out the window.

The whole point of live transfer is to free sales reps to focus on selling. But by quickly passing along the calls as they come in requires the sales rep to spend time qualifying the lead. And that leaves less time for selling.

So what's the alternative?

Soft Transfer Generates More Sales

In a warm or soft transfer, a professional sales development rep (SDR) takes the call and asks several qualifying questions. For instance, they'll determine:

- **Is the lead right for you?** Does the company fit your ideal customer profile? Do they have a problem or need that you can solve?
- **What's their purchase intent?** Are you dealing with a decision-maker with the authority to purchase?
- **What's their lead time to purchase?** Are they planning a purchase immediately, six months from now or a year?
- **Do they have a budget available?** Did they already allocate a budget to solve a problem or meets specific needs?

This initial step is critical. That's because it's a matter of quality over quantity. You

can't get enough raw leads to overcome the fact that 80% of new leads never translate into sales. It's estimated that more than 60% of sales are lost because the leads aren't qualified before starting the sales process.

After qualifying the lead, the SDR provides a quick overview of the product or service and sets up an appointment for a follow-up call with the sales rep or account executive.

The SDR provides the background information to the sales rep, so when it's time for the callback, the rep is familiar with the company, knows their pain points and has already considered how best to solve the company's problem. The SDR introduces the sales rep and recaps the initial call. Thus, the rep is fully prepped and ready to start the sales process.

Getting Started With Soft Transfer

You can outsource this function to a tele-services company. Although most will say they offer highly qualified live transfer, you need to ask the right questions of a service provider to ensure you're getting what you want:

- Are your agents dedicated to my account?
- Do they take the time to learn about my products, solutions or services?
- Will they meet with me to get my perspective on qualifying questions?
- When talking with inbound callers, do they work from knowledge and expertise and not a script?
- Do they use probing questions to identify the need?
- Will the agent stay on the call long enough to pick up insights that can help them in future lead management?

Yes, it's essential to be first to respond. But that's not all you want. You need a high conversion rate to move a lead to become a prospect and then an opportunity. Ideally, you want your sales reps selling and not qualifying leads. A professional service that offers warm transfer can be an asset to your sales team. They can separate the tire kickers from the serious callers and deliver qualified leads.

Call us at +1 813-320-0500 (US) or +39 06 978446 60 (EMEA), or contact us online for help meeting your sales goals.

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