

# Remote Selling Effectiveness Checklist

You still need a [sales process](#), and the virtual tools you use when selling remotely should be carefully selected based on where you are in that process. How good is your sales team at using the right tools at the right time?

Use this guide to determine when you should call, text, video call, or email your prospect or client...

TOOL	URGENCY	USE WHEN...	PROS...	CONS...
Email	Intermediate	<ul style="list-style-type: none"> <li>Initiating dialogue</li> <li>Scheduling appointments</li> <li>Sending agendas or documentation</li> </ul>	<ul style="list-style-type: none"> <li>+ Quickest way to send a message and keep working</li> <li>+ Creates a "paper trail" to document something important</li> <li>+ The ability to adapt to the buyer's behavior style</li> </ul>	<ul style="list-style-type: none"> <li>- Can be time-consuming</li> <li>- Tone can be misinterpreted</li> <li>- If marking an email as "priority" in subject line, then you should consider another form of communication</li> </ul>
SMS/Text	Varied	<ul style="list-style-type: none"> <li>Quick responses for non-milestones</li> <li>Meeting Confirmation</li> <li>Date/Time setting</li> </ul>	<ul style="list-style-type: none"> <li>+ Immediate back and forth without having to talk on the phone</li> <li>+ Opens another option for buyers to reach you</li> <li>+ Easy and Friendly</li> <li>+ Convenient</li> </ul>	<ul style="list-style-type: none"> <li>- Tone can be misinterpreted</li> <li>- Can be considered too informal depending on the relationship with the buyer</li> </ul>
Phone	Very Important	<ul style="list-style-type: none"> <li>Two-way conversation</li> <li>Discussing complex topics</li> <li>Build rapport and trust</li> <li>Delivering bad news</li> </ul>	<ul style="list-style-type: none"> <li>+ The ability to adapt to the buyer's behavior style</li> <li>+ Communicate a mistake or issue with emotion attached</li> </ul>	<ul style="list-style-type: none"> <li>- Calling a work phone is a last resort for prospecting</li> <li>- Voicemail is ineffective for prospects</li> </ul>
Video/Web Conference	Important	<ul style="list-style-type: none"> <li>In-depth interaction</li> <li>Discussing recommendations, data</li> <li>Presentations</li> <li>First time meeting</li> </ul>	<ul style="list-style-type: none"> <li>+ Human connection</li> <li>+ The ability to adapt to the buyer's behavior style</li> </ul>	<ul style="list-style-type: none"> <li>- Can be awkward or difficult if the buyer doesn't turn their camera on</li> </ul>

