

SALES

## There's No Such Thing as a Wrong Number Voodoo sales wisdom from David Rosen, the happiest cold caller you'll ever meet. [🔗](#)

BY JOHN GROSSMANN

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**Warm Regards** Because David Rosen develops his own leads, he looks forward to every R. Jerome call he makes. R. Jerome Ferraro

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● **As matches go, this one was near perfect: a chance meeting of a freelance writer always on the lookout for his next story and a commission-only salesman constantly looking for a lead. We met over a copy of this magazine. Literally.**

I stood in line to pay for a newspaper and the December-January issue of *Inc.*, which I had grabbed off a rack at a newsstand at the San Francisco airport. Referring to the

headline on the bottom right-hand corner of the cover, the man behind me volunteered, "I could write a story about micromanaging my first company."

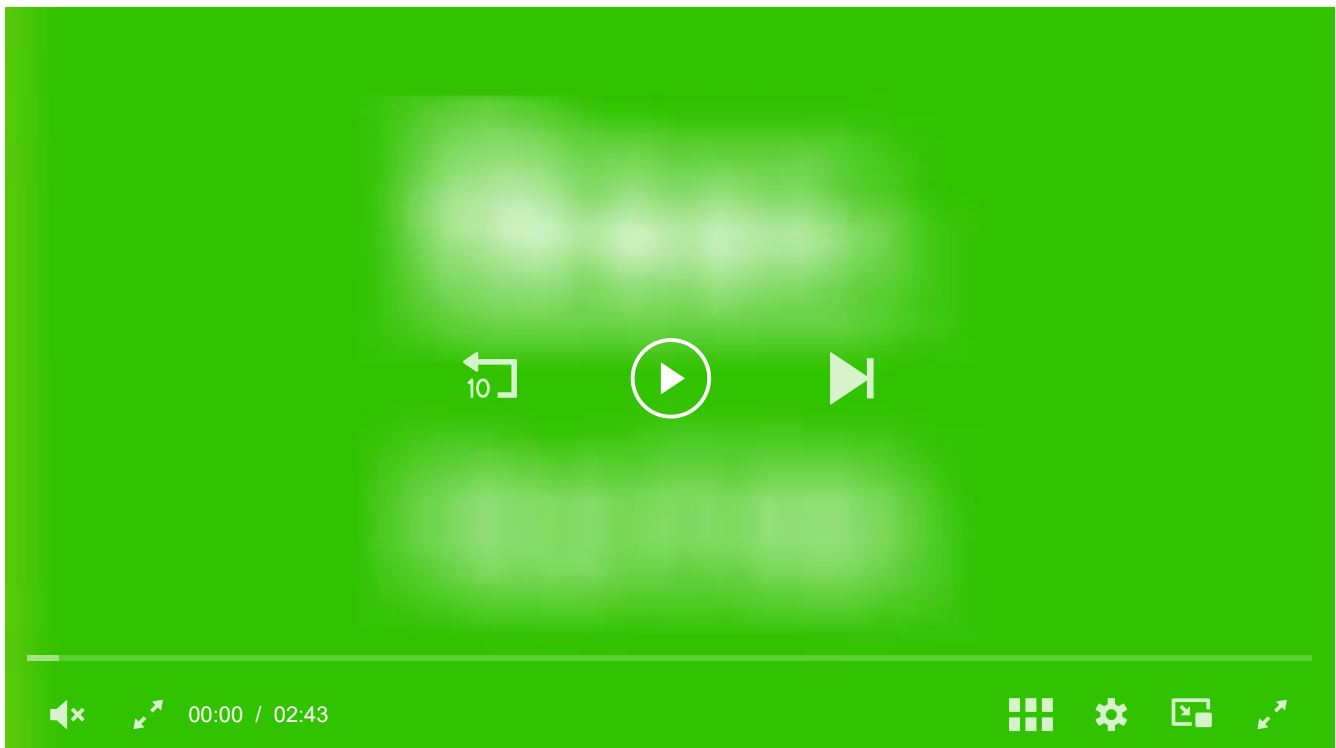
It wasn't long before he was introducing himself and handing me his business card, which identified him as a personal wine broker with Grove Street Brokers in Healdsburg, in Sonoma County. I fumbled for my own business card. Realizing I didn't have one with me, I pointed higher on the cover to the slug "Five Years of Start-Up Insanity: Was It Worth It?"

"I wrote that story," I said, and told him he could reach me through the magazine. He e-mailed me the following day. And when we spoke on the phone a week later, David Rosen sold me.

*Article continues after video.*

**FEATURED VIDEO**

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Not a case of wine. (Though he did inquire if I prefer reds or whites and asked a few questions about what characteristics I prefer in the wines I drink.) Rather, calling from his home office in a suburb of Cleveland, he sold me on the idea of writing about the sales strategies that allow him to sell half a million dollars' worth of wine a year to private individuals nationwide. If not at hello, he pretty much had me when he told me about his extensive database and the dozens of customers coded with the initials *ACI*, for *accidental call-in*. Rosen's repertoire includes cashing in on wrong numbers!

Granted, Rosen's patter pertains to a nuanced, enjoyable, lifestyle-type product that opens the door to a playful approach. If you sell hip replacements or home security systems or caskets, not all of his techniques and tips will necessarily work for you. (You will probably want to forget No. 9, which involves making a pitch while naked.) But any salesperson can learn from the following cache of cold-calling tips, performance techniques, and e-mail procedures, which have made Rosen the top seller at Grove Street Brokers.

## **1. There's No Such Thing as a Wrong Number**

For some reason, in his first stint with Grove Street Brokers, from 1992 to 1998 (he left to start a Web application development company), Rosen rarely went more than a week without an incoming wrong number on his toll-free phone line. One day, instead of cursing yet another unwanted interruption, he opportunistically countered with a kind of verbal jujitsu.

"Unless you're a wine drinker," he said, "it looks like you've dialed the wrong number."

He paused a second and then smoothly flipped the call. "Tell you what. Since I've got you on the phone and I'm not shy, I'll give you my quick 60-second speech, and you can see what you think..."

Although he hasn't kept track of all incoming wrong numbers, Rosen's 30-megabyte database has 92 names coded ACI. Meaning, these individuals listened to his spiel, told him a bit about their wine preferences, and provided him with contact information. Seventy-five of these ACI's, more than 80 percent, became customers. Among them is Keith Burgess, a seller of commercial window treatments for Hunter Douglas.

Three years ago, Burgess misdialed trying to reach his mother. He got Rosen's fax line and quickly hung up. Then Burgess's phone rang.

"Did you just call my number?" Rosen asked.

"Yeah; sorry about that."

"Wait, can I ask you a question? Do you like wine?"

As it happens, two of Burgess's best friends own wine stores, and he loves nothing more than to visit them. Wine talk ensued. The dialogue continued.

"He'd call about every three months, just a quick, few-minute conversation," says Burgess. "I told him when I got my bonus in January, I'd probably buy from him. Salespeople are harder to sell than anybody else. I was quite impressed that he called back and then was able to flip the conversation. He was taking a 50-50 gamble: I'm either going to say yes, I like wine, or no. Between that and his tenacity of follow-up, I finally said, 'I'm going to give this guy a try.' "

## **2. Cold Calling Is a Matter of Degree**

Yes, you can work from income- or home-value-sorted lists provided by lead-generation companies, but why live with meager success rates (1 percent to 2 percent, a fellow Grove Street broker confessed to Rosen in a recent sales training session) when you can push your success rate considerably higher by much more narrowly prequalifying leads you gather yourself?

Rosen rustles up plenty of potential clients with creative online searches. He plumbs the letters columns of various wine publications, scrolls through wine blogs, and Googles fruitful word combinations like *wine club* and the names of various cities. As one of 11 brokers at Grove Street, he sells limited-batch wines made by small, mostly California, wineries to private individuals who otherwise probably wouldn't have access to such wines, which range in price from around \$15 per bottle to many times as much.

Once he has identified a lead, Rosen generally spends a few more minutes on the Internet in search of potentially helpful information about the person, insights that might also help him take even more of the chill off a cold call. Tracking an individual to his or her place of business often supplies not only a job title and office phone number but in many cases a photograph that suggests the person's age and perhaps demeanor. You don't want to stalk a prospect, but the more you know, the better.

Consider Rosen's first phone conversation with John Brinzo, in August 2003. It was anything but cold. Rosen had already qualified Brinzo as a wine drinker: He had read in the home section of the Cleveland *Plain Dealer* about the wine room that Brinzo and his wife had added when they remodeled their home. Rosen found the home number and dialed it. Brinzo's wife answered.

"It was very uncharacteristic of my wife, Marlene, to do that," says Brinzo. "We have caller ID. If we don't know the party's name, we don't generally pick up the phone, and normally, on cold sales calls like that, they get nowhere. David comes across as a rather honest, charming, and engaging individual. He's certainly not a pushy guy. He must have charmed my wife, because she gave him my work number. She told me he'd be calling: 'You're not going to believe this guy; he's very engaging.' "

Marlene Brinzo had told Rosen that her husband worked at a company called Cleveland-Cliffs (now Cliffs Natural Resources). Before calling, Rosen Googled the

company and learned it was the nation's leading supplier of iron ore. He also discovered John Brinzo didn't just work at Cleveland-Cliffs. He was chairman and CEO. Rosen smiled, surmising these were not stuffy, pretentious folks. In other words, perfect for his anti-wine-snob sales MO. To date, John Brinzo, who has since retired, has placed 33 orders with Rosen.

### **3. Gatekeepers Are to Be Respected**

Rosen's first commandment for cold callers: "Don't feel the need to get past the gatekeeper the first time." Usually the gatekeeper is an assistant or, if contact is being attempted at home, a protective spouse – or one who might not want to encourage a mate's wine jones. Start out too aggressive with either, and the gate will probably stay shut. So don't push on the first call, Rosen advises. Use it to collect information that will prove helpful later.

Take note of the assistant's name so you can use it the next time you call. Take special note of the first name used for the Mr. Smith you asked for. Is it William? Or Will? Or Bill? Ask: "When do you think is a good time to catch him?" Rosen generally doesn't like to leave a message on a first or even second call. He has found persistence often pays, for it demonstrates what many deem a desirable trait. In fact, if Rosen realizes after several unsuccessful tries that he must leave a message, he may even highlight his perseverance, introducing himself as that "persistently optimistic

wine guy" before briefly explaining his service as a wine broker and providing his memorable toll-free number: 877-CAL-WINE.

Rosen does confess to one off-the-wall gimmick almost guaranteed to get you past even the most protective gatekeeper. "This was an idea from somewhere in my salesman's DNA," he says. "I Googled doctors and lawyers and professionals named David Rosen. You *know* they'll always take my call." He sold a bit of wine thanks to this Abbott and Costello – like "Who's on First?" stunt, but he has only one David Rosen, a music-store owner, among his current clients. And he was a referral. Rosen says the name trick is perhaps best used like batting practice, to warm up and get energized for the real game.

#### **4. The Customers Know They Are Customers**

Theater people talk of breaking the fourth wall – stepping out of character and speaking directly to the audience. Rosen, who has acted in community theater, has discovered this technique helps grease the sales skids, at least when the product is wine. What he does is fairly uncommon and not for those lacking confidence or chutzpah. Quite often, he openly makes fun of the sales process.

"I acknowledge that I recognize this dance we're doing," Rosen says. "Yes, these wines are better than you're going to find locally, and yes, I am picking them specifically for you, and they're just freaking wonderful. But it's not health care. It's not a mandatory thing in their lives. I also want them to appreciate and respect the fact that if they don't spend money with me, I'm not making a living.

"I can drive the conversation, and it's my job to drive the conversation, but I also want them to know that I understand that ultimately, they're in charge here. So I make fun of the fact that I'm on the phone trying to get them to spend money. I'll say, 'This is just the wine salesman in me, so be careful.' "



When Rosen is using e-mail, he tears down the fourth wall with a self-deprecating but transparently self-serving ploy in search of new business: his occasional Pester My Clients for Referrals Campaign<sup>®</sup>©. What kind of a salesman jokes that he has registered and copyrighted such a bald-faced favor-seeking mass e-mailing? The same kind whose clients respond, "Why do I yield to this kind of temptation? But...send me a mixed case." Which provokes Rosen to sign off, *Yours in voodoo*.

## **5. Learn Your Script, Then Ditch It**

In an earlier career, Rosen toured as a backup musician for Elvin Bishop and also Peter Tork, post-Monkees. (His home office, in fact, is a backyard-facing room that also serves as his recording studio and is accordingly half filled with amps and microphones, percussion equipment, a tenor sax, and various guitars.) The sales connection? Having become skilled at memorizing music and heeding onstage cues helped Rosen from the very start eschew a sales script and treat each sales call like a song, with key phrases and talking points akin to chord changes. So, tip No. 1 for avoiding the fatal flaw of sounding as if you are reading from a script: Write one if you must, but quickly ditch it – after committing its key messages or bullet-point reminders to memory.

Rosen wears a headset, not just so he can take detailed notes and, if need be, quickly search online for information about a wine or vineyard he is unfamiliar with but also so that he can talk with his hands. He finds this energizing. And staying

energized, he believes, is crucial to keeping a sales pitch sounding new and fresh.

"You could jack up on coffee or Red Bull," he says, "but a better way is to be genuinely enthusiastic about what you're doing. It's not just about making money. It's about establishing a new relationship."

He advises: "Picture you're talking to someone else, when, in fact, you're talking to the window in your office." And slow down. Insert pauses in your pitch to let your message sink in. A simple and effective way to assess your spiel and hear how stiff or natural you sound is to call your own number from another line and start speaking at the beep. Your answering machine stands ready to assist you.

## **6. Data Are Good. More Data Are Better**

After his gregarious, self-effacing sales persona, Rosen's most valuable asset is his database. It's the engine that drives his sales. He uses Microsoft Access, which allows him to easily import Excel spreadsheets. "Being kind of geeky, I've customized it to show certain fields that I create with data," he says. Rosen takes notes by hand when talking with current and potential clients and then later types those notes into his database.

"I'm sure David's take on my wine tastes is more sophisticated than my taste in wine is," says Robert Siegel, host of NPR's *All Things Considered*. An avid NPR listener,

Rosen called Siegel cold, pegging him for a likely wine drinker and knowing he would be energized the moment he heard Siegel's familiar voice.

"David's very thorough," Siegel continues. "He knows my preferred price range. And what kind of wines I want and what might be like the Stonewood Merlot that he was selling me for a long time that I liked so much."

In his data entries, Rosen employs abbreviations and codes not just to simplify the task. He does so to protect himself from corrupting his data. The fewer the keystrokes, the less likely he will be to make a typo – one that might cost him a sale. So *SB* stands in for *Sauvignon Blanc*, ensuring that when Grove Street gets in an especially good Sauvignon Blanc and Rosen does a keyword search to root out his lovers of that varietal, he won't miss a couple of potential customers because his fingers had fumbled typing *S-a-u-v-i-g-n-o-n* in their notes fields. An exclamation point or the word *fave* indicates a person's strong love of a particular wine.

Rosen taps on the keyboard of his laptop, and the screen changes. "There's 958 people who are big Chardonnay fans," he says. "Now, how many of them like it real buttery? Or oaky? I'll filter by the word *oak*....We're down to 265."

In like manner, Rosen can call out his Zinfandel lovers and aggregate their e-mail addresses in a Microsoft Word document – all 817 of them – and have that at the ready for a mailing via Constant Contact, which he uses for bulk e-mails too big for Outlook and his Internet service provider.

Rosen's database runs to 2,168 names – 275 of them coded 8888, his shorthand for *Do not call anymore*. Why not discard these? "It's my style to keep everything," he says. His pack-rat mentality came in handy once after a client died and his wife gave away his wine to some of his best friends. One of those friends contacted Rosen a while later, hoping to get the name of, and buy more of, the wine he had enjoyed.

Rosen's database is also a key motivating tool. He monitors sales as closely as he does customers. "Most people don't know where they stand financially, either with personal budgets or sales budgets," he says. "That's why my spreadsheets are so elaborate." He once tracked the number of sales calls he made a day. Now he focuses on income – and net income at that. "Knowing what you need to make, you might be surprised at how doable that is," he says. "If I average \$344 per case and I want to sell \$10,000 a week to net \$2,000, I need to sell 29 cases. That sounds like a huge amount, but that's five cases a day, if I work six days."

Moreover, dedicated parsing of his database shows precisely where his sales come from – and, therefore, how best to allocate his time. Of last year's 1,213 orders, 90 came from first-time customers, accounting for 7.4 percent of sales. More than three of four new clients – 69 of those 90 – were from referrals. Rosen also knows he made 420 sales by phone, 648 sales by e-mail, 143 by a combination of both methods, and six sales at a personal wine tasting.

## **7. A Good Salesperson Does More Than Sell**

Rosen strives to inspire loyalty in his customers, and the key to that is trust. He earns it by keeping his promises. His first promise, made during an initial, exploratory phone call, is to follow up immediately with an e-mail restating what his service as a personal wine broker entails. He has a canned recap ready to paste into the body of the e-mail, but he will always change it a bit at the beginning or the end, to include

something said in the conversation. He cautions: "It's going to come from David, Your Wine Guy, so you'll know it's not spam." Already, he is branding himself, while the iron is still hot.

He is a gifted talker, but he is also a dedicated listener. The notes he takes allow him to reliably hit the mark with repeat customers, who come to trust his personalized wine recommendations. Says Brinzo: "While he frequently sends out e-mails advertising some great buys on more expensive wines that are clearly more toward the collector guys, he knows what I want to pay, and he's 99.9 percent right." With some clients, especially those with a need to talk about personal problems, Rosen listens like a bartender. "If I were just a pure sales dog and wanted to double my numbers, I would cut my conversations by 70 percent," he says.

When the need arises, he will deliver more than great wine at fair prices. He will assist a client who asks for help, say, hosting an important business dinner. Rosen will check out the restaurant's wine list online and e-mail a few recommendations to pair with various likely entrée selections.

## **8. Nothing Is More Valuable Than a Good Referral**

Truth is, Rosen no longer has to make a slew of daily cold calls to meet his weekly sales goal of \$10,000. His business hums along nicely on referrals. You can't be afraid, he stresses, to ask your current satisfied customers if it's OK to contact their friends and colleagues. Just don't rush that request. Like a good wine, the customer-salesman relationship needs to age, to settle in a bit.

"A good rule of thumb is after the second sale, and you've checked back in and you're about to talk about their third order, now's a good time," Rosen says.

"They're clearly excited. They haven't tired of this game yet." But the key is trust.

"Do they trust that you're not going to go beat up on their friend?" When he reaches that point, he will say something like: "Now that you've got a feel for what I do and my style, who else do you think might be interested in The Wine Guy, because, of course, that's how my evil empire spreads."

At National Public Radio, Rosen's Robert Siegel beachhead has spread to 19 clients. That's far from his biggest sales pyramid. He has one stemming from a single cold call in October 2003 that brought him a referral in February 2004. That referral has spawned a prolific order tree that branches through five more levels of referrals. In all, one customer has led to 38 more customers.

Referrals rule in the house of Rosen. Of the 373 individuals who bought from him in 2009, 295 of them were referrals. In fact, some 81 percent of last year's total sales could be traced to referrals.

## **9. Nudity Is No Excuse (Not to Pitch)**

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Rosen once pitched a stranger while toweling down in the locker room at his local gym. He started chatting with a guy changing into his workout clothes. After learning enough about the man to think he might be a prospect, Rosen made a self-effacing comment about the 25 pounds he could afford to lose, thanks to his work-related "Cabernet abuse." A locker room, Rosen says, is a great place for eye contact and reading people's faces. In this case, the person Rosen reached out to turned out not to be much of a wine drinker, but he did buy some wine for his daughter and son-in-law and has also connected Rosen with others.

Sales leads can be harvested most any time, anywhere. In a locker room. In an airport newsstand checkout line. Even in a doctor's office waiting room – in a five-year-old magazine. Recently, while thumbing through a dog-eared copy of *Better Homes and Gardens*, Rosen spotted a wine rack on the kitchen counter in a home-makeover photo. The story mentioned the names of the homeowners, and with some Internet research, he tracked them down.

"I called last Saturday and got the husband," Rosen says. "He loves the idea of a personal wine broker. He used to live in California and misses the microwineries. Tells me his everyday pizza wine is \$25, and what he likes. I sold him a couple of mixed cases, a \$700, \$800 order. And he tells me: 'Everyone in my firm loves wine. As long as these are good, you're golden.' "

*John Grossmann is a regular contributor to Inc.*

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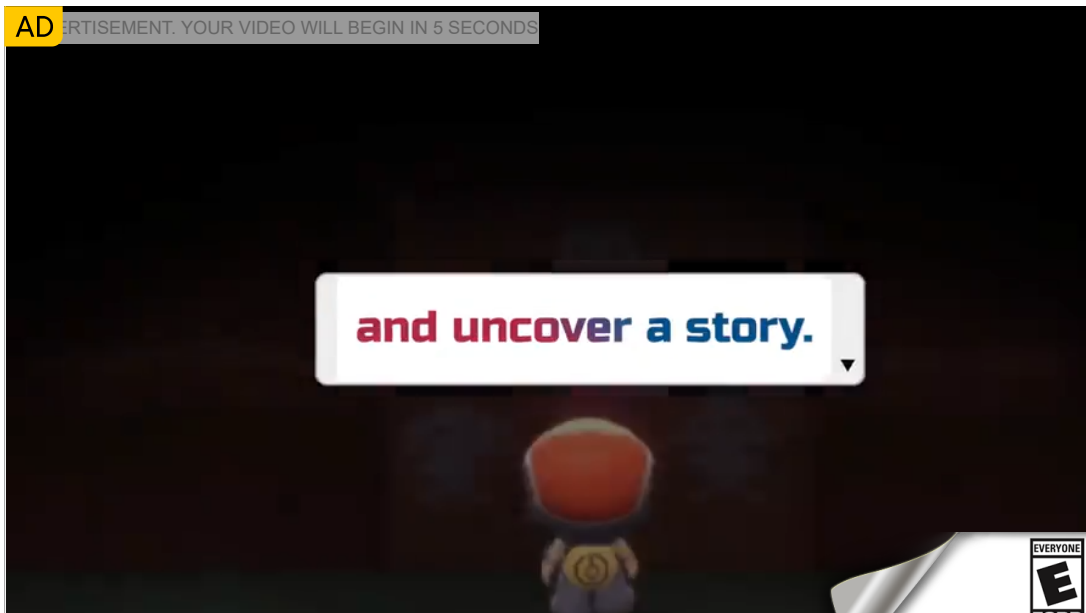
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