1. 1.Startup
2. 2.Growth
3. 3.Exit


# Session #2
# Appointment Setting 101


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***TAKE ACTION***
***And***
***START NOW***

***Start with the end in mind – What is the goal?***

***Sales Goals and KPI's***

- # Dials
- # New Opportunities – MQL/Marketing Qualified Leads
- # Initial Appointments – First Time Appts or SQL/Sales Qualified Leads
- # Follow-up Appointments
- # Demonstrations / Assessments
- # Proposals
- # Closes


# Appointment Setting

1) Make is **EASY** for the prospect to schedule
   a. Calendly is a great example of an online tool to use with emails, social media, or other online tools.
   b. If you use an online scheduling tool like Calendly, be sure to **call and qualify** the prospect before you officially meet with them.

2) Most of this training is for callers. Remember appointment setters are a rare breed. The best ones need to be detail oriented and not afraid of the word 'no'. Not all salespeople can be appointment setters. I think that's important to note. Especially if you have a rock star salesperson that is a closer.

While closing deals is often the most emphasized part of selling, you never get this opportunity without first landing appointments. If your team is struggling to get meetings, you may need to modify your strategy or execution. One of the mainstays of any business is getting appointments with influential people in an organization.

Notice I didn't say the "*right*" person, or the "*decision maker*", that will come with time. It is rare you can call the CIO or CFO and get an appointment. Although I must point out that it is something **you can do**. Businesses today have a range of people involved with any purchase, particularly those in the technology sector. **Unless you are very skilled at getting in to see the "right" people, your focus should be on getting in the front door and moving up the value chain.**

You have one objective and one objective only – to get your prospect at ease as quickly as possible to schedule an appointment with them.

# *Research and Prepare*

Cold calling may seem like a mundane task. However, you must remember that **your company's reputation is on the line each and every time someone makes a bad call.** And no salesperson likes making cold calls (as this feedback from BDM's shows)

Get yourself in the right frame of mind and understand the market you are calling. Calling the wrong people with the wrong mindset and erroneous information won't get you appointments. If you haven't done your research properly, you can forget about it. Savvy buyers will know you are only looking to sell something.

# *Research and preparation are a necessary starting point for efficient appointment setting.*

Ideally you want to find people that have a genuine need or preference for the solutions you offer and be able to demonstrate value if asked to do so. You won't find out until you talk with them, so that is why callers are so important to lead generation. Part of your preparation should be understanding objections and ensuring you have a logical set of steps to help the prospect overcome their objections.

- **Because objections are good.**
- You should welcome them.
- They allow you assist the buyer along a path that can help them overcome their objection.

Think of it this way: Which of these comments would you rather hear?

*"I'm not sure your solution can help us reduce our lead times for project delivery"* or *"Sure, send me on some information"*.

Research your marketplace, align your prospecting efforts with the solutions your company provides and develop a precise profile of the audience you need to go after.

If your role is in sales management, coach your reps to make calls with the intent of helping targeted prospects with a need. As someone who has been on the receiving end of cold calls (yes, I get them too), **there is nothing worse than someone unprepared for questions.**

I recently had a call from a sales person, and the conversation went something like this:

*"Hello Mr. Humphries, my name is John [not his real name] from John's Marketing Stuff Plc [not his real company], and I was hoping I could grab a few minutes of your time. We're working with companies such as yours to help them identify visitors to their website. Is this something you'd be interested in?"*

*"Sure. What companies like mine are you working with?"*

*[Silence]*

*Me: "Hello?"*

*[Long Pause] "Ermm, we work with [names a few companies that are in entirely different industries than ours]"*

*Me: "Yes, I know them. But you said you were working with businesses similar to mine. Who are they?"*

*John: "I need to get back to you on that. Can I set up a 2-week demo with you?"*

*Me: "Not right now thanks, John. Maybe send me across some information."*

Not a good pitch, right? And more importantly, it soured the company in my eyes. Hadn't they bothered to train their sales staff on how to make a sales call? After all, there are plenty of other companies out there that offer a similar service.

# Stop Selling!

Yes, you did read that heading correctly. Salespeople have a natural inclination to want to sell a product when interacting with a potential buyer. Nobody wants to have something pushed upon them. Instead, appointment setting calls are designed to intrigue a prospect enough to get a face-to-face meeting.

**Your goal is to set an appointment, not sell them something.** (Or as in the case of our friend John, a demonstration of the service.)

By calling with a genuine desire to help, it is easier for salespeople not to pressure prospects. Don't force the issue.

Instead, reps should call with a sincere belief that they are trying to help a prospect out of a situation or predicament. This helpful tone is less likely to offend buyers or put them on guard.

# *Remember, your goal is to arrange a meeting so don't lose focus of that.*

Don't be shy about getting to the point and asking for some time to introduce how your company has helped similar organizations. Just make sure you have your facts & figures correct.

# Share Examples

People are naturally hesitant or reluctant to agree to a meeting with a salesperson. As I mentioned above, this defensive posture often comes from the belief that sellers only want to sell something.

One of the best ways to intrigue a prospect and land an appointment is to share examples of how similar people and companies have benefited from your solution.

The proof is in the pudding, as they say, and nothing sells better than a referral. Before or during your call, direct the prospect to a website or landing page where they can read customer testimonials or see a demonstration of your product.

Alternatively, share a particular story about a buyer in a similar position, including the problem faced, the solution used and the benefits achieved. Case studies are excellent tools as well.

## 5 Effective Appointment Setting Tips to Succeed at Cold Calling

A convincing speaker is an artist who very well knows how to hypnotize listeners with words. The same theory applies to a seller who successfully convinces people to buy his products. This article will be discussed about the concept of appointment selling which, if utilized in a proper way, can improve your sales drastically. It is a commonly used selling trick, which in a way has increased the competition among businesses.

A person receives thousands of sales phone calls and most of the time these calls are ignored. That is why it is essential for an appointment setter to be convincing enough to make the potential customer listen to him thoroughly. Then comes the question of buying.

An appointment setter has to get rid of the old and monotonous way of initiating sales calls. The first and foremost important thing for them is to grow interested amongst the listeners in the conversation.

Here are some tricks of appointment setting that will surely help you in fixing qualified appointments through calls.

## *1. Do not try to sell over the phone*

Setting an appointment is definitely a part of selling but do not jump into it at the beginning of the discussion. Your ultimate motto is definitely selling but your immediate motto is to set an appointment. If you sound like a salesperson to your prospect, he might lose interest in your call.

Purchasing decisions cannot be made on calls and as an **appointment setter**, you should refrain from trying to do that. Neither of you should make plans to sell or buy products or services at this stage. You need to prove it to your potential client with your words that you called up to fix an appointment not to sell products.

## 2. Prepare a good script

To advertise a product or service in the best way possible it is important for the caller to hold sufficient knowledge of it. It is recommended for them to make a script framework after the training is done. He could also initiate trial calls, based on the script, for the best results.

This simplifies the entire process of fixing appointments for the callers. It is to be noted that the callers should not be forced to use the exact language given on the script. It is all about making the conversation authentic and reliable to the customers.

**The script will help you in the following way**

- Dealing with the gatekeeper
- Handling negative responses
- Building rapport and
- Understanding the prospect

## 3 Prepare yourself for objections

Objections are an inseparable part of such cold calling. It really does not matter how eloquent you are as a speaker; you will face objections inevitably. The best way to handle this is to be prepared for it. A dedicated appointment setter puts his efforts to find ways to manage such calls with ease.

## 4. Give them options

While scheduling meetings an appointment setter should offer at least a couple of dates to the prospect so that they remain available for the meeting on their preferred date and time.

If you offer two dates to your prospects, they would not be able to give the excuse of being busy on a particular date. Being specific about the choices of dates will add a bit more importance to the appointment.

## 5. Sell the appointment

Always remember that you are calling a prospect to fix an appointment and your focus should be on that only. Callers often get distracted from the aim and try to sell products in the call which is no less than a disaster.

Put emphasis on selling the appointment instead of products and services. You need to grow the potential customers' interest in the conversation so that they listen to you. You can do the following to achieve that

- make them laugh
- offer them something beneficial
- solve their problems and
- be fast and straight forward

Once the ice-breaking session is over, it becomes easier for you to continue the chat. You can start sharing information with them about the product and finally when they seem to be convinced, schedule an appointment based on their convenience.

## What are the best ways to get past a gatekeeper?

1. **Give the gatekeeper the benefit of the doubt.** Most salespeople assume that an assistant doesn't have the time, judgment, or influence to help them, and therefore ask immediately for the decision-maker. Huge mistake! Treat every assistant with the courtesy and respect of a CEO. Doors will magically open for you.
2. **Treat the assistant like a human being.** This is obvious, but most assistants don't aspire to be assistants forever. Google their name. See if they blog or tweet. What's their web presence? Find something that they are genuinely interested in and run with it.
3. **Use your arsenal.** Make a joke. Play good cop/bad cop. Talk about the weather. Mention a tidbit you saw in the news. Ask about their company's latest release. Ask if they're running the company yet. Whatever your style, get the assistant on your side. After all, they're controlling your access to the company. There's no need to make them enemy #1.

4. **Write down the assistant's name.** Refer to them by name, every time. Be friendly, polite, and direct. Remember that you are not yet their highest priority, and being impatient, self-righteous, and vague is never going to get you there.
5. **Be honest and forthright about your solution.** Value the assistant's time - it's just as important as the decision makers. Explain to them up front what you are calling about and why you think it will add value. Don't hang up and try again if your target is unavailable – it's disruptive and dismissive. Worse, you've wasted an opportunity.
6. **Ask for help.** The more you can engage the gatekeeper in the process, the better. Ask the assistant about the best time to call, the easiest way to get in touch, direct numbers, cell phone numbers, etc. Ask if it's better to leave a voicemail, leave a message, or just to call back. But before you do that…
7. **Assume the assistant is a decision maker.** Believe it or not, the assistant's job isn't to keep you at bay. Rather, their job is to discern potential value for their executive and/or their company. By that logic, you should involve the assistant's judgment as much as possible. Gatekeepers have an ear to the ground about every aspect of the business. Ask them about their pain points. Where would they see the most value added? What's most important this quarter? Next quarter? Next year? What's their growth strategy and what are their bottlenecks? What's their biggest frustration? Assistants offer unique insights that can help you refine your pitch.
8. **Ask who else is involved.** Gatekeepers have the ear of everyone that will be involved in your sale. They know who you should be talking to. Ask if you are targeting the right person. Do they know anyone that might be of assistance? Who should you talk to first and why? **Above and beyond yourself, who else is involved with the decision of what you buy and from whom?** Let the assistant paint the relationship structure for you and guide you up the ladder.
9. **Alleviate their burden.** Assistants are responsible for sourcing and evaluating vendors. If you've called them at the right time, you've eliminated their legwork. Let them be responsible for walking your sale through the company. Don't blow it by presuming that they won't be involved in the process.
10. **Let the gatekeeper advocate.** If you've effectively engaged the gatekeeper, they will be your advocate throughout the entire sales cycle. Let them make introductions on your behalf. Ask about the best ways to engage various decision makers. Ask their opinion on what's most important to each decision maker. Use them as a strategic sounding board as your deal goes through the pipe. The more they are engaged in the value, the more value they add to you.

**HOT TIP**: Call early in the morning before the gatekeeper arrives as its much easier to connect with who you are calling!

## Tips on follow-up phone calls after a proposal is presented.

After you present the proposal, **do not leave your potential client until you have secured the next steps.** You don't want to hand over your work and leave with nothing more than "hope to hear from you soon."

Outline the next steps for them and then follow through.

If the next step involves a follow-up phone call, then let them know when you'll place that call. Then, on the appointed day, call and let them know, per your previous discussion that you are following up with them. Here are some additional dos and don'ts:

**1. Don't say "I'm just calling to follow up on the proposal."** The word "just" in this context belittles your efforts. And, you are not calling to follow up. You are calling for the business--ask for it.

**2. Do put an expiration date on your proposal.** If you have some type of special configuration, additional services or you've included a special price on the proposal, you don't want that to be valid forever. Put something on your proposal that effectively says, "this offer is good until May 31, 2022." You want to maintain control of the offers that you have out there. Make it easy on yourself by having the offer self-destruct at a given date.

**3. Do leverage your network within the target company** to stay on top of information that may have an impact on the decision. For example, if the decision maker gets called out of town.

**4. Don't leave it to the client to initiate a return call.** They are busy, and you are driving the sales process. Always make sure that everyone involved knows the next steps and that you will be calling them.

Also, always make use of your trial closes to gauge how the client is positioned. When you call them, make sure that the solution still fits their needs, that there are no additions and changes, that they are ready to begin.

***NOTES:***

## ***HOMEWORK:***

- ☐ Review Microsoft script
- ☐ Review phone tips
- ☐ Create your own phone script