HOW TO MAKE SETTING B2B APPOINTMENTS EASY

(SalesScripter B2B Appointment Setting Sales Methodology)

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SALES SCRIPTER

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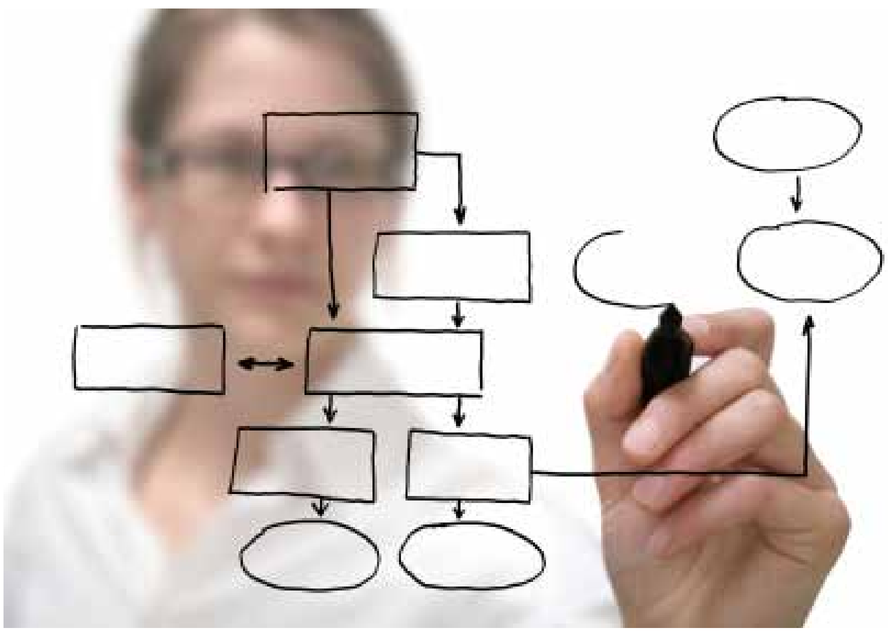
OVERVIEW

Selling can be tough. Not only is it tough to get prospects on the phone, but when you do connect, they often do not greet you with open arms.

That is the bad news. The good news is that there are small things you can do to make things easier and to directly improve your level of success.

We have structured many of those tactics together and created a B2B appointment setting sales methodology that anyone can use regardless of sales skills and experience. This ebook takes you step-by-step through this methodology.



HOW THIS METHODOLOGY DIFFERS FROM OTHER APPROACHES

Our approach is different from how the majority of salespeople and sales trainers do things.

Not All Fluff

A lot of the sales training material out there can be labeled under the category of "All Fluff". This is the material that sounds good and can be very motivational and inspirational, but there is a lack true substance and it will usually not have any depth in the area of telling you what you need to do.

You may come across this type of training material when you either read a book or attend a seminar and you end up getting pumped up and feeling good. But when you get back to your desk and it is time to pick up the phone, you are not any closer to knowing what to say and ask if the prospect answers your call.

There is no doubt that there are some good things about this type of material and we all sometimes need a little help getting more motivated from time to time. The problem with this is that there is a lack of clarity or details around what you actually need to do in order to get better or be more successful.

I view this training or management style as a cheerleader or a Nike "Just do it!" approach. They get you motivated to "do it" but don't tell you how to "do it".

Our methodology differs from this in that we are going to provide complete clarity around what you can do to improve your results. You will know exactly what to say and ask when you pick up the phone and how to respond in all of the different situations you will can find yourself in.

Not Too Complex

On the other end of the spectrum from "All Fluff" is the category of "Too Complex". This includes sales methodologies that actually do tell you what to do, but the structure is too complex and cumbersome to realistically adopt or implement.

An example of this is a methodology that I read in a book that requires you to fill out some sort of 3x3 matrix as you meet with clients. Or a system that I learned while going through a training program that suggests that you fill out questions on cards for the different prospects and accounts that you are trying to sell into.

There is no doubt that the 3x3 matrix and the questions on the cards are all extremely valuable steps and that they will improve your level of preparation and question asking. But the problem here in my opinion is that these methodologies are too complex or cumbersome and that will make them more difficult to adopt in the long-term either for yourself or for your salespeople.

We differ from these methodologies in that our methodology is based on very practical and easy to implement concepts and this makes it a more flexible approach that is easier to adopt and incorporate with existing sales styles and philosophies.

Consultative Selling

Our methodology is a consultative selling approach that is built around asking good questions. The methodology tries to establish conversations and make them more about the prospect than about the products sold and this shift in focus is primarily accomplished by asking good probing questions.

By asking good questions, you will accomplish many very powerful things. First, you will present yourself more as a consultant or business person than a salesperson. This will help you to make a better impression, gain more respect, and build more rapport with the prospect.

Since you are asking good probing questions, you will also extract extremely valuable information from the prospect. Not only will this help you to identify which prospects you should spend your valuable time with, it will also help you to gather details that will make it easier for you to build your case of why the prospect should move on to the next step in your sales process.

Not Pushy and Aggressive

The majority of salespeople sell by trying to talk someone into purchasing and pushing them to move forward to the next step in the sales process. Our approach is less focused on trying to talk someone into wanting what you have to sell and is more focused on finding the prospects that need what you have to sell and communicating effectively to separate the good prospects from the bad.

Where another salesperson will have to be pushy and aggressive while trying to get a poor quality prospect to move forward, you will spend less time with prospects that are not a good fit and instead be dealing with better quality leads that require less pushing and aggressiveness.

You Will Sound More Like a Consultant or Business Person than a Salesperson

A key belief that we maintain is that people don't enjoy being sold to and as result, this methodology is designed to make you sound more like a business person or a consultant than a salesperson.

Everything that our methodology gets you to do will help you to achieve this and we will make you sound more polished and professional. Not only will this help you to make a better impression, it will also decrease prospects' guardedness.

CORE CONCEPTS

These are some key concepts that we would like to outline before presenting you with the step-by-step appointment setting sales methodology. Having some awareness of these concepts will help you to understand why are our methodology is designed the way it is and that will help you to be more successful in your use of these tactics.

Sales Prospects are Extremely Busy

The first thing to keep in mind is B2B sales prospects are extremely busy. Or we can at least assume that they are busy, especially if you are calling at a decision maker level.

This is important for a couple of reasons. First, it can sometimes seem impossible to get your target prospects to answer the phone. When this continually happens, you can begin to think that they are avoiding your call. But the reality could very well be that they are never in their office or at their desk when you are calling.

You also need to keep this in mind for when you do get a sales prospect on the phone. If you assume they are extremely busy, you may want to factor this in with how you approach your call and the time you are trying to spend with them. We will make some suggestions for this when we explain the appointment setting sales methodology.

They Get a Tremendous Amount of Sales Calls

It is helpful to be aware that your prospects get a lot of cold calls from people like you. This impacts the process of setting appointments in a couple of ways.

First, this will make the prospect more motivated to let your call go unanswered. This can also impact how the prospect receives your call when they do answer the phone. If they have had a lot of cold calls and then they get you on the phone, they may have less patience and openness to what you have to say.

They are Likely not in Buying Mode

When you are cold calling, you are typically calling prospects that have not raised their hand to express interest or have not contacted you before. When this is the case, you need to keep in mind that you are likely to reach prospects that are not in "buying mode".

In other words, you have something to sell and the prospect is likely not in an active process of looking to buy what you have to sell. This is not to say that they do not need it or will not be interested. They are just not sitting there thinking about the topic that you are calling them to discuss.

Their Guard Will Typically be at a Medium Level

When you add up some of these other factors like the prospect being extremely busy and getting a lot of sales calls, you will end up reaching prospects that have their guard at a medium level. When they answer your call and don't know who you are, they are going to be a little defensive trying to determine who you are and if you are going to take (waste) any of their valuable time.

Those assumptions may sound scary and like a reason to not even call. These are what they are and we will not sugar coat it—cold calling and appointment setting can be tough. But do not worry as this B2B appointment setting sales methodology takes all of those factors into consideration and will help you to defuse those challenges.

An 8 Step B2B Appointment Setting Process

Here is a 8 step process that you can use to improve your ability to schedule appointments when cold calling B2B.

STEP 1—FOCUS ON THE GOAL

The first step in this process is to identify the right goal to focus on when cold calling. The reason we are putting this step out there is that at any point in a sales cycle, you will likely have two goals:

Ultimate Goal: Close the sale, sell the product, get a new client

Immediate Goal: Advance the prospect to the next stage in your sales process (schedule the appointment)

If you are like the majority of other salespeople, you spend most of the day thinking about the ultimate goal and how you are going to sell more and get more clients.

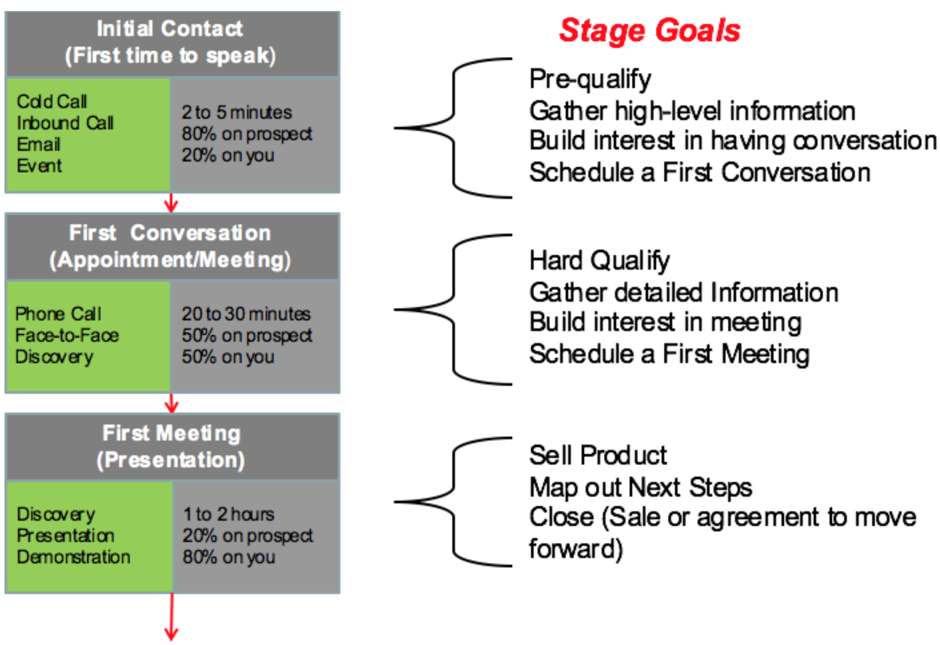
There is nothing wrong with always thinking about this goal. The problem that comes into play is that we forget to focus on the immediate goal of moving the prospect to the next step and staying focused on this immediate goal is important in some of the early sales process stages. Like when you are talking to a prospect on a cold call and not staying laser focused on getting the meeting scheduled.

Here are some reasons why this is going to improve your sales efforts:

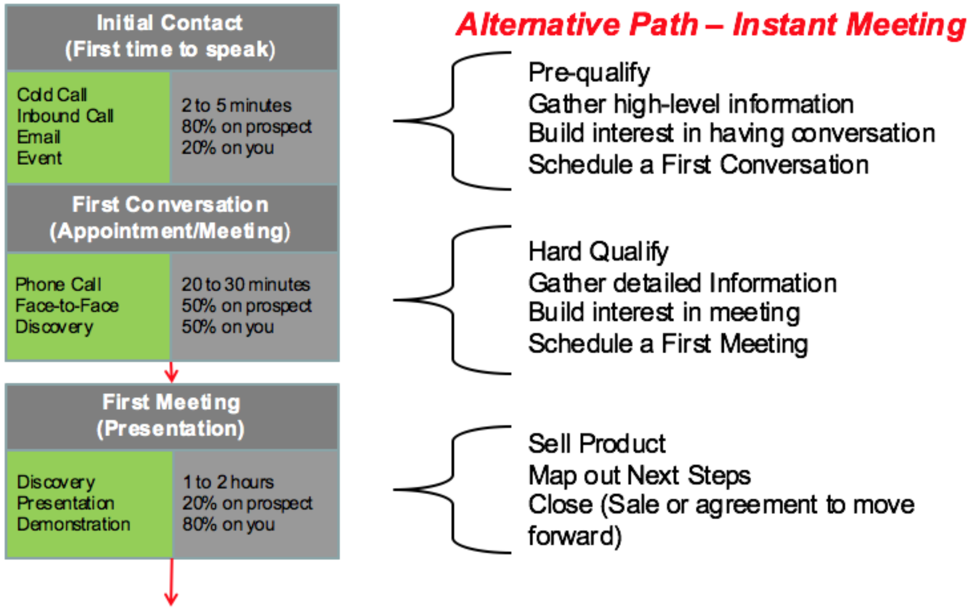
B2B cold calls will not be long enough to really sell your product.

When you are B2B cold calling, you really only have between 2 to 5 minutes to work with on each call. This simply is not enough time for you to work with to fully sell your product or service in most cases.

(Please note that this point and overall strategy might not apply or be a good fit if you have a "one call close" type of product.)



Your call may go beyond 5 minutes and this may mean that you have progressed beyond the cold call and have progressed into the meeting stage. In this case, what you have done is create an "instant meeting" which is what we call an appointment that happens at the same time as the cold call.



While it might seem positive to have a cold call that keeps going with questions or good discussion, there is actually some downside to this. The main issue is that you might get more time and attention with the prospect if you prevented the instant meeting and scheduled an appointment as this will typically involve putting some amount of time on the prospect's calendar. Not only will this block of time usually be longer than an instant meeting, but you may have more attention and focus from the prospect.

Notice how I mention "prevent the instant meeting" just now. There is actually something very important in the "prevent" step here that will help you with setting more appointments.

When you have a cold call that rolls into an instant meeting, there is usually some sort of discussion or line of questions that make this transition happen. For example, the prospect hears part of your pitch and asks you a good question. You get excited by the question and then give a thorough explanation. Next thing you know, you have been talking for 10 minutes. Guess what—you have ended up in an instant meeting.

The problem with that flow is that you missed a great opportunity to go for the appointment and fulfill your immediate goal of moving the prospect to the next stage in the process. The opportunity missed is when the prospect asked a good question and you answered it. Here is something that you could say instead:

> ***That is actually a really good question. The answer to that might take a bit to explain. Since I have called you out of the blue here, why don't we schedule some time where we can go into more detail with what you asked about and then we can address any of your other questions. Are you available for a 20-minute conversation next Tuesday morning or Thursday afternoon?***

What can help you with this piece is being aware of where you are in terms of early sales process stages when B2B cold calling. Maintain an awareness that the cold call stage is only 2 to 5 minutes and that is only enough time for you to ask a couple questions. As soon as the prospect begins to ask you questions back, you should stay aware that answering the questions is going to take you beyond the scope of the cold call and this can be your cue to slow the conversation down and try to schedule an appointment.

Another reason to pump the brakes here is that there is some level of curiosity on the prospect's side if they are asking you a question. Try to leverage this as much as you can to get the prospect to agree to meet. Don't satisfy their desire for information by giving them an answer right then.

Focusing on the Meeting Makes Many Objections Invalid

When you really maintain a laser focus on the immediate goal of trying to establish a conversation (get the appointment), it actually can create a frame where many of the prospect's objections become invalid.

For example, prospects can often use some of these objections to try to get rid of you:

We are not interested.

We don't have budget.

We already use someone.

We are not looking at making any changes.

If you associate those objections with our ultimate goal of trying to sell something, they make a fairly good case for why we should not keep moving forward. But they become invalid from a standpoint of not even really making sense when you apply them to the immediate goal of having a conversation.

The fact that the prospect does not have budget is a reason not to purchase, but it is not a reason to not meet. The fact that they already use someone today is a reason to not purchase (or could be), but it is not a reason to not meet or have a conversation.

STEP 2—CONFIRM AVAILABILITY

Step 2 in the process takes place at the beginning of the cold call and this is to confirm that the prospect is available for your call. You may be reading this and disagree as there are many salespeople that don't believe asking the prospect if they are available. Sometimes the reason against this is that prospects are always busy so why ask if they are available and give them an opportunity to get rid of you by telling you that they are busy.

The truth is that, yes, your prospects are always busy. And that is one of the reasons why this is an important tactic to consider. The key thing to identify here is whether or not your prospect is normal busy or crazy busy. Normal busy is where the prospect is at their desk and busy working on normal tasks and could stop what they are doing without causing a major disruption. Crazy busy is where the prospect answered the phone but is really not available to talk even for a few minutes due to dealing with a fire, being right in the middle of something, having someone sitting in their office, etc.

We will make our case for why you should confirm that the prospect is available at the beginning of the call and you can either try the suggestions that we make or you can skip this step in the process.

Why We Feel this is Important

This is important because you are calling someone unexpectedly and your call is technically uninvited so you need to be completely respectful of the prospect's time.

Consider a scenario where you go talk to a coworker in the office without having a meeting on the schedule. When you get to the coworker's office, you notice that they are busy working on something. Would you just sit down, interrupt what they are doing and start talking about what is on your mind?

Maybe you would, but one way to approach them is to check to see if they are busy at a level where it would make them a little annoyed and challenged if you were to talk to them and take them a way from what they are doing.

To do this in a tactful way, you may ask:

Are you in the middle of anything?

Notice that we don't ask if they are busy, because we know they are. We don't ask them if they have a minute, because we want more than a minute. What we want to know is if they are busy to a degree where they can't stop to talk with us and this is a great question to get right to that piece of information.

Without this small piece of information, we have no idea what the coworker is working on and what is going on in their head at that particular moment. They might be right in the middle of something that is very important and they are completely unavailable to talk with you.

Not only is this a politer way to communicate with someone, it is very powerful in that it is something so small yet it accomplishes a lot of different things:

- You will be proceeding with permission
- You will know that you are not interrupting anything
- You have just bought yourself a window of time to work with
- You have shown the coworker that you respect their time
- You will add to the level of rapport that you have with the coworker
- You minimize the possibility being a disruption

Applying to Cold Calling

If you agree that what we outlined is the best way to handle trying to grab some time with a co-worker, then apply that same logic and process when cold calling a target prospect as you can expect to see the same benefits.

- ➜ You have just bought yourself a window of time to work with (2 to 5 minutes)
- ➜ You will know that it is a decent time to try to make your pitch and attempt
- ➜ You will add to the level of rapport that you have with the prospect

Another reason to approach your prospects in this way is that, if the prospect answers the phone but is extremely distracted and is unavailable, it might not be the right time for you to try to attempt to go through your pitch anyways.

Sure you might be able to push the call forward for a sliver of time if you catch a prospect at a horrible time and don't give them a chance to say anything about that. But the odds of you pushing your way forward and getting enough attention from an unavailable prospect to adequately deliver your pitch and successfully close for the appointment are fairly low.

You might be better off letting them get back to what you are taking them from and trying to give your pitch a shot at another time, especially if you can identify the best time to call them back.

The Wording to Use to Confirm Availability

While we recommend checking to make sure the prospect is available, we do not recommend confirming this by asking if the prospect is "busy" from a wording perspective. We know that the prospect is busy because that is one of the assumptions that we are always keeping in mind. With that being the case, if you ask the prospect if they are busy, the answer has a very high probability to be "yes" and that would not start the call out in the right direction.

Another reason to not use the word "busy" is that you might present yourself as not having something of value to offer them since you are worried that they might be too busy for what you are calling about. Think if I had a bag of money to give you. I would not worry about you being too busy to discuss the bag of money because it is so easy for both of us to see that it is valuable and going to be worth your time to discuss.

A great way to handle this is to replace asking if they are busy with asking if you have caught them in the middle of something. This is a more accurate question to what we want to know because we know that they are busy and more so are trying to identify if they are not able to break away from what they are doing for 2 to 5 minutes. Here is what this will look like:

> ***Hi Mary, this is Michael Halper from SalesScripter. Have I caught you in the middle of anything?***

Disarms by Increasing Familiarity and Decreasing Formality

Something that is real interesting about asking for availability in the way that we suggest is that it makes you sound more informal and casual. And while that might sound like a negative impression to make when you are trying to be "salesperson of the year", it can actually help you to disarm the prospect's guard.

Why this works is that asking if someone is in the middle of something can be similar to what a coworker, friend, or an existing vendor would ask. A typical salesperson might try to sound a little more formal and this creates a totally different vibe at the beginning of the call and that is one of the things that can begin to trigger guardedness.

Don't Ask "How are you?"

We also suggest that you use this questions of "Have I caught you in the middle of anything?" as a replacement for the typical salesperson opening question of "How are you doing today?".

You may think that it is polite to ask the prospect how they are doing and that this is going to help you to create some rapport and make a good impression. And that it might be a little rude to not ask the prospect how they are doing.

The reality is that when calling B2B, your prospects are extremely busy and if you start out the call by asking them how they are doing, and then they have to ask you how you are doing, you end up in an exchange where two strangers are asking how each other is doing. This can create a moment where you are showing the prospect that you are starting to waste their time as they know that you don't care how they are doing (because you don't know each other yet) and they don't care how you are doing.

You think you are being smooth by starting a call out with this question and taking a step forward with the prospect but you are doing the exact opposite. You are starting to waste valuable time and making yourself look like a salesperson trying to sell something and this can begin to trigger the prospect's guard.

(Please not that this suggestion of not asking "How are you doing today?" goes away as soon as you have spoken at least one time with the prospect or if they call you in an inbound sales call or customer service scenarios.)

STEP 3—ELEVATOR PITCH

After you confirm that the prospect is available, you are going to want to share with them some sort of elevator pitch. Not only should this be designed to grab their attention and create a little intrigue, but it is also helpful in communicating what angle you are coming from in terms of what you are wanting to talk to them about.

Don't Talk Products and Company

Before we talk about some things you can do to create a good elevator pitch, let's talk about what not to do here.

Whatever you do, try to avoid talking directly about your products or company at this point in the call. This worth stating because there are many salespeople that do exactly what we are telling you not to and that can look something like this:

> ***I am with StrikeSoft and we are the leading provider of home automation solutions. We provide everything from the software systems to the actual hardware that you will install in your home. It's an end-to-end solution.***

There are two major problems with this. First, this does not communicate any of the value that is offered. In other words, it does not tell the prospect "what is in it for me".

Another problem with this is that it screams "I am a salesperson and I am about to try to sell you something" and this will immediately put the prospect on defense and trigger guardedness.

If you agree with that logic, think about how starting a call this way impacts a salesperson's results. Right at the beginning of the conversation, the salesperson thinks they are saying something interesting and taking a step closer toward their goal. But the reality is that this type of approach can do the exact opposite by turning the prospect off and taking a small step backward right out of the gate.

Here are three options for what you can do to create an elevator pitch that will help you to communicate clearly with prospects, create interest, and get the call going in the right direction.

Elevator Pitch Option 1—Value Statement

One thing that you can share as your elevator pitch is a value statement. This is a one sentence statement that communicates the value that you or your products have to offer. Here is an example of a value statement as an elevator pitch in the beginning of a call.

Great. The purpose for my call is that we help sales managers to decrease sales staff turnover and get underperforming reps to meet and exceed expectations.

Elevator Pitch Option 2—Pain Examples

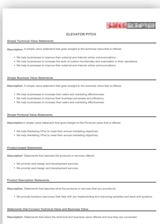
Another option for your elevator pitch is to share examples of the problems that you can help the prospect to resolve, minimize, or avoid. Here is an example:

Great. The purpose for my call is that we work with sales managers and find that they often have challenges with it taking a long time to get new sales hires ramped up and there are often too many underperforming reps.

Elevator Pitch Option 3—Name Drop Example

One great way to communicate how you can help is by sharing an example of how you helped another client. If you can squeeze that into one or two sentences, it can make a great elevator pitch and here is an example:

> ***Great. The purpose for my call is that we worked with Polar Industrial and helped them to automate their ordering process and this led to a decrease in inventory costs by 30%.***



SalesScripter

will help you to develop your elevator pitch.

STEP 4—SOFT DISQUALIFY

This next step is optional as it might not fit with your selling style and it is to perform a soft takeaway right after you share your elevator pitch. We call this tactic a soft disqualify and use that term because a full disqualification is where you determine that the prospect does not fit with what you have to offer. This is what you might say when you disqualify a prospect:

Based on how your number of employees, you all will not be a fit with how our system and pricing works.

To deliver a full disqualification is to basically close the door on the prospect and this is not what we want to do at this point. Instead, we want to express a soft version of this and that will allow us to perform a version of the sales takeaway and this can help us to disarm the prospect and establish the call.

Here are some examples of statements that you can say to softly disqualify:

I actually don't know if you need what our services provide.

I actually don't know if you are a good fit for what we provide.

I don't know if we can help you in the same way that we help other businesses.

I don't know if you are the right person to speak.

When you add this to your elevator pitch, it might look something like this:

Great. The purpose for my call is that we help sales managers to decrease sales staff turnover and get underperforming reps to meet and exceed expectations.

But, I actually don't know if you are a good fit for what we provide. And that is why I was calling with a question or two.

Why this is Helpful

When a prospect answers your call, they will have their guard up at a medium level as they will be trying to determine who you are and what you want. Everything that you say will either get them to increase or decrease this guardedness. We have already talked about some small changes you can make to decrease the prospect's guardedness and this is going to be another small, yet very powerful thing that will help you with this.

This is effective because when you say something like this, it tells the prospect that you are not going to push something on them that they do not need and that you are looking out for their best interest. This can not only help to disarm the prospect and decrease their guardedness, but it can also help to build rapport and trust.

Delivering your elevator pitch followed by a soft disqualify creates a very powerful push/pull effect. Your elevator pitch will share something enticing and then your soft disqualify is going to slightly take that away. This by itself will not make someone pull out their credit card to purchase, but if you replace that other scenario where you would normally talk like a salesperson and mention details about your company and products and instead use this one-two punch of elevator pitch and takeaway, you will make a big improvement on how you open and establish prospecting phone calls.

STEP 5—PRE-QUALIFY

At this point in the phone call, you have confirmed the prospect is available and that essentially means you have bought yourself 2 to 5 minutes. You have delivered your elevator pitch and performed a soft disqualify helping you to make the prospect intrigued and also disarmed. Now it is time to ask a few pre-qualifying questions.

What are pre-qualifying questions?

Pre-qualifying questions are questions that determine if there is at least a slight fit on the prospect's side for what you are trying to sell. These are very soft questions that try to learn more about what the prospect is doing in the area where you have something to sell.

They can try identify if the prospect is using anything similar to what you sell. Or if they are having any of the problems that you help to fix. You could also ask some light questions to determine if the prospect is the right person to speak with or if the business fits as the types of companies that you work with.

The Goal is to Determine if it Makes Sense to Keep Talking

The reason why it is important to identify if there is even a slight fit is that this will let us know if it makes sense to keep talking. Time is very valuable and an appointment is going to take a decent amount of time out of our calendar and it will not be a good use of this time to spend it with a prospect that does not even have a slight fit with what we sell or have to offer.

And while you may have a quota and want as many meetings as possible, to schedule a meeting with a poor quality prospect that has an almost zero probability of purchasing will only hurt your results more than anything. Instead of spending time with a bad prospect just to get a meeting complete and appear productive, it would be better to spend that time looking for better quality prospects.

Deeper Qualify in the Appointment

The pre-qualifying questions are fairly light and soft. We will save the deeper qualifying questions for the appointment that we schedule.

In order to fully qualify the prospect, we might want to ask them questions to identify if they truly need what we have versus just wanting it. It will also be good to identify how much purchasing authority the prospect has. You might want to probe to see if money or funding is available for the purchase. You may want to identify how genuine the prospect's intent to purchase is.

But there is no need to ask these deep qualifying questions in the cold call or initial contact. Not only is there not enough time and attention to work with, we don't really need to know all of this just yet. Our goal is to move to the next stage of the sales process and it is the lighter qualifying questions that will determine if it makes sense to move on to the appointment stage of the sales process.

Why this is Helpful

As we already mentioned, your time is extremely valuable and not everybody fits well with what you have to offer. One of the keys to protecting your time (and the prospect's) is going to be including a few pre-qualifying questions in your cold calls and initial contact conversations.

Decreasing the time you waste on bad prospects should translate into dollars in your pocket. But the power of centering your pitch around good sales questions does not end there. Here are some other ways this will transform your game:

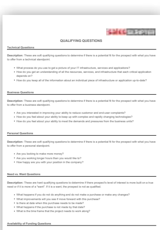
- ➜ Shifts the focus of the call from you to the prospect—less "all about me" type of approach
- ➜ Makes the call more interactive and engaging for the prospect
- ➜ Gives a purpose to the call—looking to ask a couple of questions
- ➜ Extracts valuable information
- ➜ Helps you to protect your valuable time

- Makes you seem more professional and consultative, less pushy
- Makes you seem more trustable because you are asking them questions before selling
- Helps to build rapport as it shows you as being interested in learning more and caring about the prospect—operating with the prospect's interests ahead of yours
- Presents you more as a consultant or business person than a salesperson
- Provides one of the best places to turn for objection rebuttals—redirect to one of your pre-qualifying questions

How to Create Your Pre-Qualifying Questions

Unfortunately, we cannot just give you a list of what pre-qualifying questions you need to ask because everybody's questions can be different as they are very tied to what you sell. What we can do is provide you with a logical process to go through to build your own list of pre-qualifying questions.

- **Step 1:** Identify the benefits that your products and features offer to the buyer persona that you are targeting
- **Step 2:** For each benefit, identify the corresponding problem that is resolved, minimized, or avoided
- **Step 3:** For each problem, compose a question or two that probes for the existence of the concern or problem and these will be a good start for a list of pre-qualifying questions



SalesScripter

will help you to develop your list of pre-qualifying questions.

How to Effectively Use Your Pre-Qualifying Questions

If you design your questions correctly, they should probe for the problems that you help your prospect to resolve, minimize, or avoid. And if we stay focused on our primary goal of scheduling an appointment, then we do not need to ask all our pre-qualifying questions. We only need to ask enough questions to determine if the prospect has a hint of the pain that we can help with and when we are able to identify that, not only does this tell us that it makes sense to keep talking (spending more of our valuable time in an appointment), we also now have a reason to schedule an appointment.

The way to apply this to the actual call is that you could ask a pre-qualifying question and if you get a good answer from the prospect (one that confirms that there is a concern, pain, or interest), you can jump ahead to Step 7 in this process, which is going to be a pre-close step. This may involve a transition statement by saying something like:

Oh I see. Well, that is one of the reasons why I am reaching out as that is the kind of thing that we help with.

After you say that, you can advance to Step 7 in this process.

But if you get a neutral or negative answer to one of your pre-qualifying questions, you can move on to the next pre-qualifying question and repeat this process until you either get a good answer or have asked three pre-qualifying questions.

(See Call Workflow in the Appendix for a visual representation of this)

STEP 6—SHARE EXAMPLES OF COMMON PROBLEMS

If you reach the end of Step 5 and you did not get any great answers that give you a reason to close for an appointment, you can then advance to Step 6 which is to share some examples of common problems.

Your goal in Step 5 was to try get a hint of pain or concern on the prospect's side. If your questions did not uncover that, than you can just be a little more direct with the prospect and tell them the problems that you are trying to see if they have.

A way to deliver this is to say something like:

> ***Well, it sounds like you guys are doing pretty good over there. But a lot of [insert buyer persona type (CFOs, manufacturers, small businesses, etc.)] that we talk with often have challenges with [pain point 1], [pain point 2], and [pain point 3]. You all do not have any of those concerns?***

At this point, you are getting straight to the point to see if the prospect has the problems that your products and services can help with. You tried to be a little less direct with your questions and when those did not lead to uncovering any pain on the prospect's side, you can then use this as somewhat of last resort attempt to find a reason to meet.

It is a last resort for a couple of reasons. First, it is a much more direct than your pre-qualifying question so starting out with a few questions is a softer, more consultative approach. The other reason is that this is more of a closed-ended question putting out there exactly what you are looking for and letting the prospect respond with some form of a "Yes" or "No".

If your prospect responds with some sort of positive response that there is a hint of pain or uncertain if there is or not, you can then advance to Step 7, which is going to position you to go for a close (pre-close step).

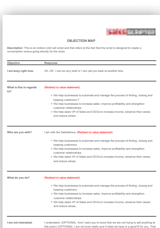
If your prospect confirms that they do not have any of the problems that you shared with them, you could potentially wrap the call up and move on. This becomes your walkaway point and the logic here is that the prospect is doing well and does not need what you have.

You should feel OK walking away at this point because you asked the prospect questions to probe for the pain that you can help with and that did not uncover anything. You then directly tell them the pain that you can help with and that did not find anything. This means that the prospect most likely will not need what you have to offer. Please note that composing the right questions to ask and the right pain points to share is important for this logic to work.

If you don't uncover any pain and you don't want to give up, you can still advance to Step 7 (pre-close step). You will just be heading toward a close attempt with less of a reason for the prospect to meet with you (and less of a reason for you to invest more of your valuable time).

You also should proceed with caution as you still might be able to schedule an appointment with a prospect that does not appear to have the pain that you can help with and these are the prospects where you can get productive conversations going but those stall out when it is time to purchase because there is not enough of a justification to spend money (no pain). This path can lead to wasted time and effort and this is why the walkaway direction can be advantageous.

(See Call Workflow in the Appendix for a visual representation of this)



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will help you to identify the key pain points that you should look for when talking with prospects.

STEP 7—SHARE BRIEF COMPANY AND PRODUCT INFO (PRE-CLOSE STEP)

Step 7 in the process is going to be the step you take right before going for the close and this is where you will share some brief details about your company and product. It may help to start to think of this step as the "pre-close" step in your sales pitch.

This is a good place to reiterate the point that our goal here is to set the appointment and we are not necessarily trying to sell the purchasing of the product. As a result, we only need to share enough company and product info so that we build interest to a level where we are able to close the prospect on advancing to the next stage in our sales process—the appointment.

There is only a brief amount of time to work with at this stage in the call so we need to be as efficient and powerful as possible in terms of what we say to try to get the prospect interested in meeting.

A standard approach at this point in the call might be to share a quick description or details around what your company and product does at an extremely high level. That is an OK approach but we feel that there are some other things you can consider saying here in addition to that and those are outlined below.

Communicate the ROI that Your Product Will Deliver

If you are selling something, there is going to be some sort of financial cost that your prospect will incur. And if your product delivers benefits to the buyer, then there is a return against the investment that the prospect is going to make with you—return on investment (ROI). It can be easy to forget about talking about this when we get a chance to talk about our products and company but this type of detail is a very efficient way of both triggering interest and communicating how you can help.

The best type of ROI talk track is one where you are able to communicate some sort of financial return on investment. The prospect will pay $X for your product but that will deliver X% return on that investment. Or the purchase of your product will pay for itself in X months.

But not every product has a financial ROI. It might be something less tangible like decreased stress, improved quality of life, increased happiness, etc. Whatever the case, you need to communicate what this return is and when it might be realized.

Explain How You Differ

Your product likely differs in one way or another from your competition. This also is a great and efficient way to trigger a little interest before you go for the close.

If you do not have any direct competitors, your competition might be the status quo and the option for the prospect to do nothing. You will certainly differ from the status quo and this can be powerful to share.

Paint a Picture of a Future State

If you were to talk about what your product does, this may help a prospect to visualize how they will use your product. But take that one step further to help them to visualize what it will be like down the down the road if they use your product.

A good example to demonstrate this is if you sold a piece of exercise equipment. Explaining how it works in terms of using the equipment is helpful. But describing what the prospect's life will be like if they use the equipment every day is how you paint a picture of the future state. And this may include talking about losing weight, decreasing medical costs, decreasing stress, improving personal relationships, having more fun, being happier, etc.

Share a Client Example

We mentioned that you can use a name drop example in your elevator pitch in the beginning of your call to try to grab the prospect's attention and communicate how you can help. If you don't use that at the beginning of the call, you can use a name drop example at this point in the call as you try to build interest and prepare for your close attempt.

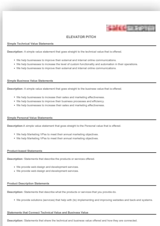
Discuss the Threats of Doing Nothing

Whether you have direct competition or not, you always compete against the option to do nothing. One way way to not only disarm this competitor, but also to build interest is to discuss the negative things that could or will happen if the prospect does not do anything.

For example, if you sell some sort of warranty coverage, you could discuss what the cost would be if there is a problem without your coverage in place.

Again, your goal here is to share just a brief amount of information so that you trigger some interest and then you move on to the next stage of the process. What you do not want to do is get into some sort of deep conversation at this point in the call as you will want to save that for the appointment.

(See Call Workflow in the Appendix for a visual representation of this)



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will help you to develop statements that can trigger interest on a cold call.

STEP 8—CLOSE

Step 8 in this methodology is the attempt to close the prospect on the appointment that you are trying to schedule. If you have gone through all of the other steps that led to this stage, this should be a fairly easy thing for you to do as you just need to ask for the meeting.

The interesting thing is that if you polled 100 salespeople and asked them what sales skill they would like to improve the most, a bulk of the group would say that they would like to be a better closer.

But if you do all of the proper steps before you go for the close, like communicating a compelling elevator pitch, asking some good probing questions to identify if the prospect needs your help, minimizing the prospect's guardedness by not sounding like a salesperson, and building a little interest, closing the prospect should be one of the easiest steps in the process. It is not crazy to have the close step happen effortlessly when you do all of the other things correctly.

That being said, here are some different ways to try to close the prospect.

Trial Close

Trial closing is basically performing a test close. You do this by checking in with the prospect and asking questions to see where their head is at and if you are heading in the right direction. Here are some examples of trial closing questions:

What do you think about what we have discussed so far?

Is this something that you are interested in discussing in more detail?

Do you want to continue this discussion?

If you don't want to go for the close directly or just yet at that point in the call, you can always trial close the prospect.

Soft Close

Soft closing is an approach that is a little more aggressive than a trial close as it is asking for a close but doing it in a softer way. Here is an example:

> ***A great next step would be to schedule some time where we can discuss this in a little more detail. I have some time available next Tuesday morning or Thursday afternoon. Is that something you would like to put on the calendar?***

Hard Close

Hard closing takes your approach up one notch and it is just removing the question aspect of that to tell the prospect that you all should meet. Here is an example:

> ***A great next step would be to schedule some time where we can discuss this in a little more detail. I have some time available next Tuesday morning or Thursday afternoon. Which one of those works best for you?***

Don't Give Up if You Can't Close

Even if you do everything perfectly, you still may end up not being able to close the prospect on the appointment. Don't worry as we have a clear game plan for you if that happens.

The important thing that determines what direction to go is thinking about what you have already done on the call. Here are some potential paths to keep in mind:

Option 1: Go Back to Your Pre-Qualifying Questions

If you go for the close and the prospect does not agree to meet, you could go back to your pre-qualifying questions if there are any remaining that you did not ask. Here is how you might do this:

Oh, I see. If I could ask you one more question, how often are you all performing a risk analysis?

When you do this, you are trying to do two things. The first thing is that you are trying to keep the call going. And once you do that by redirecting back to your pre-qualifying questions, you are then looking for an answer to one of your questions that enables you to go back again for another close attempt.

If the prospect gives you a good answer during your second pass at the questions, you can go back for the close with something like this:

Well, what you just said there again is why I think we might have a very productive conversation as that is exactly the type of challenge that we help with. Are you sure this is something that you are not interested in schedule 15 to 20 minutes to discuss in more detail?

Option 2: Go Back to Share Some Common Pain Examples

Remember how we talked about a last resort option you can try where you go direct and share with the prospect the problems or pain points that you help with? If you did not use this last resort option on this call before you went for the close, you can fall back to this as a response if you attempt to close but you are not able to schedule the prospect for a meeting.

Here is what this might look like:

Oh, I see. Well, I am a little concerned about one thing though. A lot of [insert buyer persona type (CFOs, manufacturers, small businesses, etc.)] that we talk with often have challenges with [pain point 1], [pain point 2], and [pain point 3]. Are you saying that you all do not have any of those concerns?

From there, you are either going to get a confirmation that they don't have the concerns or pain points that you are looking for or you will get a response with a slight acknowledgement of possible pain. If you get a response with a slight acknowledgement, you then have a reason to go for the close again and have increased the justification for meeting.

But if you go this direction and get a confirmation that there is not any pain, you will not have many other directions to go other than wrapping up the call. But one way to look at this is that, if you shared the problems that you help to fix and the prospect genuinely does not have those problems or concerns, then they are not a qualified prospect and not someone that you should spend valuable time trying to sell to. And you tried at least one extra effort after your initial close attempt before walking away in this scenario, which should give you confidence that you gave it a good effort.

END OF THE PROCESS

Step 8 is the last step in the process. You will be going for the close and either scheduling the appointment or going back to a previous stage in the process before trying to attempt the close again. At some point in that circular effort, you will either schedule the appointment or reach a point where it appears that walking away makes the most sense.

Although, if you are really following this process, you should be communicating clearly how you can help, asking good questions, looking for prospects that fit well, and making a good effort at building interest. So if you do reach the walkaway point, you should feel confident that that is the best direction with that particular prospect and that it is more to do with the level of fit than your effort and approach as a salesperson.

ADDITIONAL RESOURCES

Here are some additional resources that you may want to use and refer to as you look to implement the B2B appointment setting sales methodology that we just outlined.

Getting a Hold of Prospects Webinar and Workflow Document

The majority of this ebook talks about what to do when you are on the phone with a prospect. But let's face it, if you can't get the prospect to answer the phone, everything we have shared up until now is just about useless.

We have developed a methodology similar to what have shared in this ebook that is a set of suggested steps that you can go through to get connected with the prospect. You can find a recording of the webinar **here** and we have also included a call cadence workflow diagram in the Appendix.

Dealing with Objections Webinar and Ebook

What we did not discuss much in this ebook is the subject of objections. The reason why is that dealing with objections is an entire subject all unto itself. And because of that, we have a dedicated ebook and webinar where we present a methodology that tells you exactly what you need to do to be more prepared and get around objections.

You can view the webinar **here** and download the ebook **here**.

Dealing with Gatekeepers Webinar

Gatekeepers can also play a role of blocking you out and preventing you from getting far enough into an organization where you can use the methodology we discussed in this ebook. Similar to how we handled objections, we have separated that as subject by itself and we have delivered a webinar on how to effectively deal with gatekeepers when phone prospecting and you can view a recording of that **here**.

How to Effectively Use Voicemail Webinar

Receiving prospects' voicemail boxes is big part of phone prospecting. We have developed a methodology for how to take this obstacle and turn it more into a sales communication tool and we presented that in a webinar that you can view **here**.

How to Use Email to Generate Leads Webinar and Ebook

With it being difficult to get prospects on the phone, email is a sales tool that must be used correctly. We have an ebook on how to build an email drip marketing strategy and you can download it **here** and we also presented a webinar on the same topic and you can view it **here**.

The Cold Calling Equation—PROBLEM SOLVED Book

In the B2B appointment setting methodology that we just outlined in this ebook, we touch a lot of different concepts. We have a paperback book (or Kindle version) called **The Cold Calling Equation—PROBLEM SOLVED** and this book has a chapter that goes into each of these concepts in more detail.

The nice thing about purchasing the paperback version is that it makes a great reference manual to keep on your desk when making phone prospecting calls. You can find out more information on this book and purchase your copy **here**.

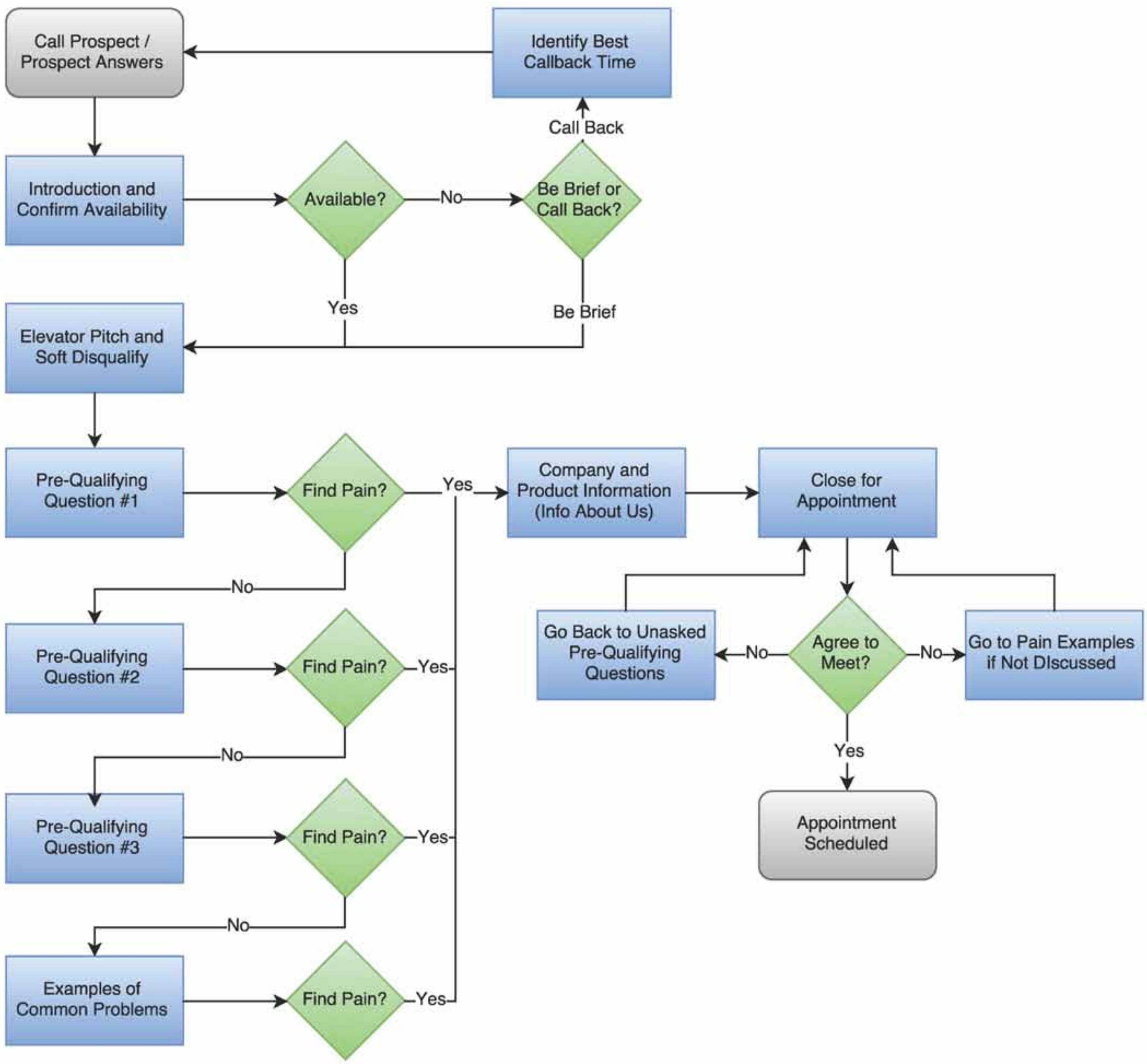
Visit Our YouTube Channel

If you find this information helpful, you may want to visit and subscribe to our YouTube channel as this is where all of our webinars and sales tip videos are posted. You can visit our channel **here**.

SalesScripter Software

If you like some of the tactics that are discussed in these ebooks and videos, you may want to check out our software app called SalesScripter. It is an app that will help you to build your sales pitch and it will provide you with sales scripts, email templates, voicemail scripts, objection response and more. You can get more information from our website **here**.

APPENDIX 1: CALL WORKFLOW



APPENDIX 2: CALL CADENCE WORKFLOW