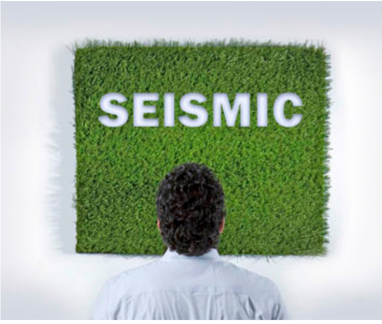

Creating Effective Appointment Setting Scripts

Blueprint For Success

Introduction

In this document, you will find information to help you understand proper techniques and best practices for creating effective appointment-setting call scripts.

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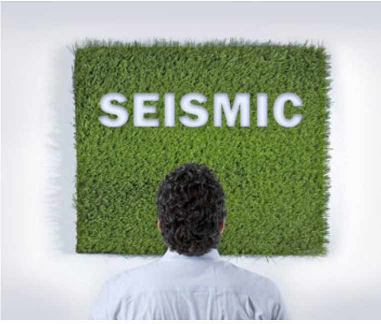


What is an appointment-setting call script?

An appointment-setting call script is a documented, rehearsed sales presentation delivered over the telephone to a prospect in order to qualify them for and generate interest in the caller's product or services, and whose ultimate goal is to secure an appointment for the prospect to meet with a sales professional and set the proper expectations with the prospect for this meeting.

Goals of the appointment-setting script

- Qualify Prospects
- Generate Interest
- Schedule Appointment
- Set Expectations

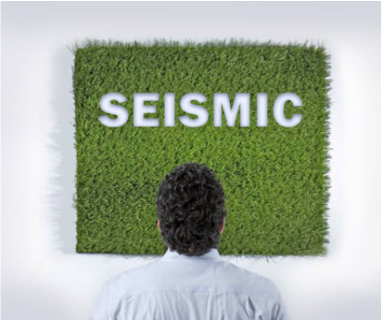
The secret to successful appointment-setting

Prospects - whether cold, warm or hot referrals or leads, invest their time to meet with sales professionals because they find value in what is being offered. What do they find value in, and how do they find this value? They find value in the ability to remedy their pain, and they find it through the appointment-setter's delivery of a well-crafted call script.
In order to set a qualified appointment that can be closed in a reasonable amount of time, the appointment-setter's attitude is crucial to success, and they must be confident, motivated and able to expose at least one of the prospect's pain points and exploit it so that the prospect acknowledges it as a real challenge that needs to be addressed, and then assure the prospect that the provider holds the answer to addressing it.

Appointment-setting and the 7 step sales cycle

The 7 step sales cycle is the process a sales professional executes during each engagement with a prospect and consists of proper preparation, displaying a solid first impression, conducting excellent qualifying, delivering the right presentation, effectively overcoming objections, successfully closing the opportunity and performing excellent follow-up for the next sale.

The prospect's appointment-setter's call scripts should focus on executing these 7 steps in this order, but in brevity, as they are simply trying to set an appointment for a larger, more intimate engagement. To do this successfully, the provider's script will consolidate and reduce these 7 steps into 4.

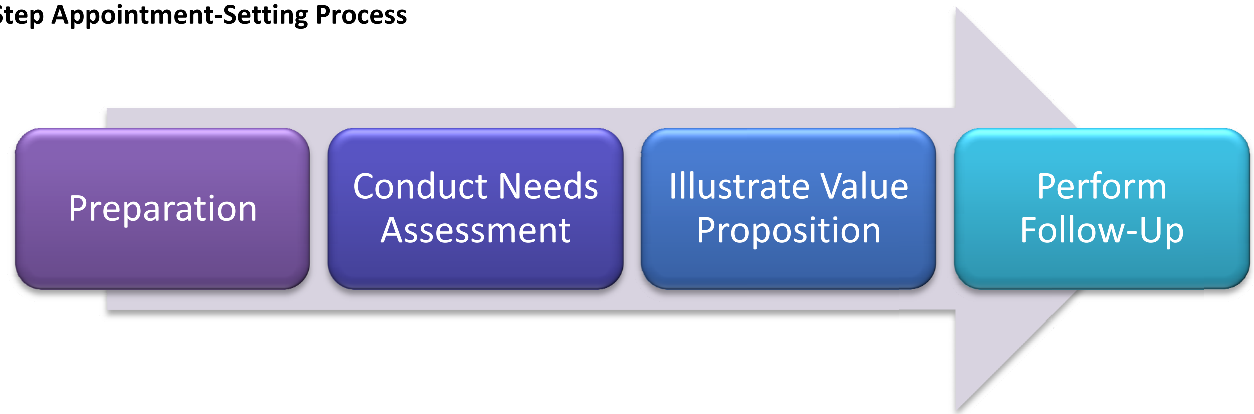


Creating Effective Appointment Setting Scripts

Blueprint For Success

The first step in the appointment-setting process consists of preparation. As in any endeavor, the better the preparation, the higher chances of success – so the appointment-setter must be more prepared with effective questions and responses than their prospects. The second step is the Needs Assessment – the process of qualifying the prospect for the provider's products and services. The appointment-setter will ensure the prospect worth engaging by meeting the provider's requirements for profitability; and qualify them in such a way that the prospect acknowledges for themselves that there is a need for the provider's services. The appointment-setter will ask carefully crafted questions in such a manner as to increase the prospect's buying temperature and prepare them to accept the sale to come. In the third step, the appointment-setter will illustrate the provider's value proposition in such a way that the prospect will be eager to set an appointment to meet with them. Lastly, the appointment-setter will execute valuable follow up techniques that continue to prepare the prospect for the inevitable close.

The 4 Step Appointment-Setting Process



The Gatekeeper

The first person that the appointment-setter will likely engage is the Gatekeeper. The prospect's appointment-setting scripts must properly arm the appointment-setter to succeed against this staff member. Successfully maneuvering past the Gatekeeper can be the difference between success and failure. Successfully trained appointment-setters will utilize the Gatekeeper to develop the information they will need in order to secure an appointment, once they succeed in speaking with the prospect directly.

The Gatekeeper will have knowledge of many of the things the appointment-setter wishes to discover during the qualifying process, such as whether the organization employs an in-house IT person, or if these services are outsourced; and they may have an informed opinion of the quality of their work. The Gatekeeper also knows who the real decision-maker is – or if there are more than one decision-maker.

Perhaps most importantly, the Gatekeeper will know how to engage the decision-maker. The smaller the office, the more intimate the relationship between the Gatekeeper and the decision-maker, and the more valuable they become as the appointment-setter's internal advocate.

Which questions to ask

As a result of dealing with numerous sales calls, prospects have developed a habit of saying "no". It is important to realize that this is simply a habit, and with this understanding, the appointment-setter should ask carefully crafted questions that do not give prospects an opportunity to respond out of habit.

If a prospect is asked a question in a way that allows them to respond out of habit, they will most likely respond with a "no". For example, a classic "say no" question is "did you receive the information we sent to you?" Out of habit, your prospects can and will say no to this question. The challenge with this is that a response of "no" is very difficult to recover from to carry positive momentum through the rest of the call.

It is crucial to construct questions in the call script in a way that forces prospects to hear the question, process it, and respond in a way that requires fresh thought – not thoughtless habit. For example, instead of asking "did you receive the information we sent you?" the appointment-setter should ask "what did you think of the information we sent you?" However the prospect responds, the appointment-setter has successfully engaged the prospect in thought, instead of halting their progress. The appointment-setter can now continue through the appointment-setting process.

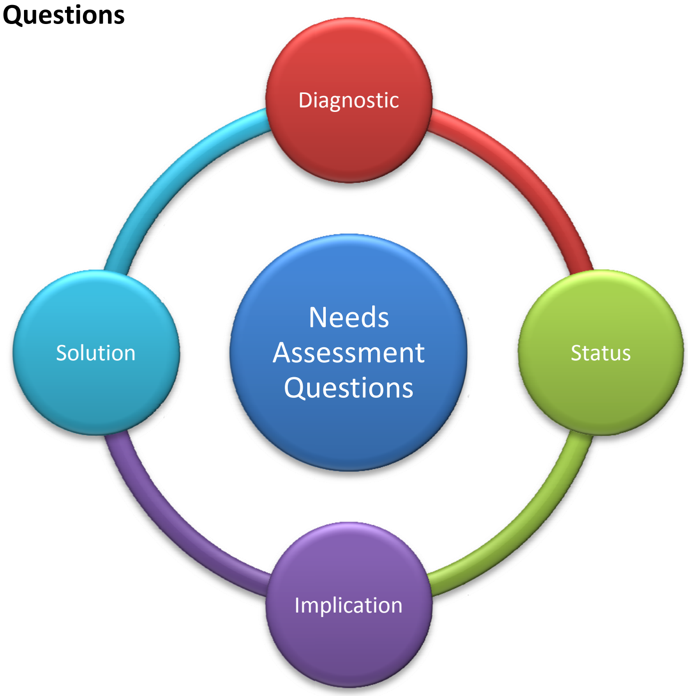
The key to scripting effective questions is developing open-ended questions. Open-ended questions are a way to get prospects talking - and it is only when they are talking that they can be qualified and their pains can be identified, which improves the chances that they will agree to an appointment.

Conducting the Needs Assessment

The first part of the call script should satisfy the 3rd step of the sales cycle – qualifying. This section of the call script is called the Needs Assessment. The Needs Assessment should consist of 4 different types of questions. The first set of questions that should be asked are called Diagnostic Questions – these questions are designed to establish credibility early, so that the appointment-setter can earn permission to proceed through the call script.

The next series of questions to be scripted are called Status Questions. Status questions are questions that allow the appointment-setter to confirm interest and build the buying temperature of the prospect to prepare them for the next set of questions, which are called Implication Questions. Implication questions are sometimes referred to as Involvement Questions. These types of questions are designed to show prospects what life is like with the provider's services. The last series of questions that should be in the call script are called Solution Questions. Solution Questions are the types of questions that will demonstrate to the prospect that the provider is the answer to their challenges.

Needs Assessment Qualifying Questions



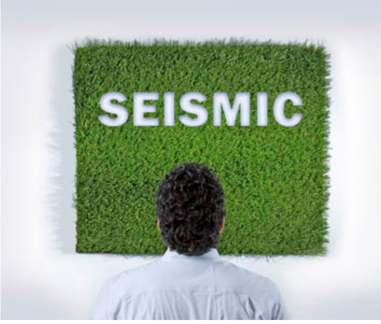
Diagnostic Questions

Diagnostic questions are designed to establish credibility. Diagnostic questions are questions that speak to very specific items – either vertical-specific challenges, line of business applications, general business or warm-up topic specific questions. For example, if the prospect is a CPA, the appointment-setter could ask, “Has your company upgraded to the new version of Pro System FX?” Asking this question establishes credibility, as it clearly demonstrates knowledge of the tools the prospect uses. This distinguishes the appointment-setter and provides leverage to allow them to navigate through the rest of the script.

Status Questions

The second series of questions that should follow the Diagnostic Questions in the Needs Assessment are Status Questions. Status Questions will determine if the prospect has the potential to become an A, B, or C client.

As a result of gaining credibility with diagnostic questions, the appointment-setter can now ask questions concerning the environment’s status and receive candid answers. Status questions are asked to gain an understanding of the importance of general and specific technology to prospect. This can be achieved by asking questions such as “To what extent is network security important to you?” Most of the time when asking this question a typical response of “very important” may be voiced. However, the prospect that values network security highly will elaborate and explain why. This is the type of response that reveals valuable information the appointment-setter seeks.



Implication Questions

The next set of questions in the call script are Implication (or Involvement) Questions. Implication Questions are questions that allow the prospect to visualize what life is like with the provider's services as opposed to without them. Implication questions should follow naturally as follow-up questions to Status Questions. For example, if a Status Question about network security is asked such as, "To what extent is network security important to your company?" the prospect may reply with "Very important, we have HIPAA Compliance to deal with, as well as some other industry regulatory requirements." A good Implication Question to follow up with would be "So what would happen if one of your interns became disgruntled after termination - what process do you have in place today to immediately disable that employee's network credentials to keep them from accessing sensitive data?" This type of question will increase credibility, get the prospect thinking, and build interest along with a sense of urgency. An effective appointment-setting script will include different types of Implication Questions the appointment-setter can ask depending upon the conversation.

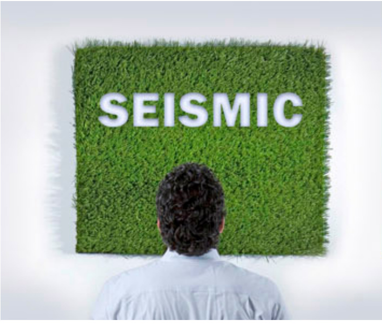
Solution Questions

Solution Questions are geared to exploit the prospect's pain to create urgency for an appointment. Once Implication Questions are delivered, qualified prospects will feel uncertain as to the status of their current environment, and Solution Questions will give them hope. The appointment-setter will ask Solution Questions in a way that assures the prospect that the provider is the answer to the recently revealed uncertainty. For example, "Mrs. Prospect, wouldn't you agree that the security of your network is worth a simple conversation?" The reason this question can be used as a Solution Question is because the solution becomes the conversation proposed. The reason this is effective is that a simple conversation is neither threatening nor expensive. Most importantly, this type of question allows prospects to easily answer with a "yes".

Delivering the Value Proposition

At this point in the call it is time to present the value proposition, which is ultimately the appointment. There are several key items to note when recommending a face-to-face visit to the prospect, the first of which is not to make a big production out of the appointment. This recommendation should be presented in short form and be brief. Since the prospect's pain has been identified through questioning, the appointment does not need to be oversold. If the questions are well scripted and delivered effectively, the prospect will agree to a meeting. The appointment-setter should not get into specifics regarding what will occur during the appointment, but simply assure the prospect that the provider has a solution to their needs that will require a simple conversation to explore.

A very effective technique used during appointment-setting is to leverage the "Herd Theory", where the prospect is informed how other companies have benefited from meeting with the provider about similar challenges. The more companies the better, and these companies should be added to the call script for reference. Lastly, the appointment-setter must be sure to confirm that the prospect understands that they are meeting with the provider to discuss how certain specific pain points can be addressed. This improves the provider's return on the investment in traveling to the prospect's location and conducting the next part of the sales cycle.



Setting the appointment

As the appointment-setter navigates through the script and comes to the point of the Value Proposition, there are some key things to remember when asking for the appointment. First, they always want to assume the sale with confidence and never fear asking for the appointment. If it is assumed the appointment will be set, the appointment-setter's chances of success will greatly improve. The reason the appointment-setter calls the appointment, "an opportunity to have a simple conversation," is to prevent making something big out of something small, and to keep moving forward as if the appointment is not a big deal. If it is not a big deal to the appointment-setter, it won't be to the prospect. However, they will not know what the next step is, so they need to be led there by continual forward progress through the conversation. Lastly, when setting the appointment date and time, the appointment-setter should provide the prospect options – but not too many. A good way to approach this is with a question such as "does Tuesday or Wednesday work better for you?"

When asking for the appointment, a successful lead-in statement for the appointment-setter is: "I could go on over the phone about how this all works, but unfortunately there is really no way to conduct the necessary evaluation over the phone. That's why most of the clients that I just mentioned set up personal meetings to go over this information – to make sure we're addressing their key issues effectively – and this only takes about 20 minutes. Would that be valuable to you?"

Follow-Up

Once the appointment has been set, it is vitally important to conduct the proper follow-up. Setting the appointment is a very small portion of a larger picture. The goal is not to set a ton of appointments – the goal is to close Managed Services business. Constructing call scripts in a manner that sets the proper expectations for the prospect effectively prepares them for the sales professional to walk in to the appointment and close them.
In order to accomplish this, all of the appropriate facts about the prospect and their environment must be gathered by the appointment-setter, such as their pain points and the hardware and software they use and the number of users in their organization (to name a few), so that the sales professional conducting the appointment walks into the engagement well-informed and prepared. If the appointment-setter has earned sufficient credibility, this information should be easy to gather. Another piece of critical information to verify is if there are any other decision makers; and if there are, they will need to be identified along with their positions within the organization.

The script should also contain a brief narrative that the appointment setter can deliver to appropriately set the prospect's expectations for the appointment with the sales professional. This narrative should stress such points as that the visit will be free of charge, and that its primary goal is to discover if there is a fit between the respective organizations that will allow the provider to address the challenges the prospect is experiencing. It should also inform the prospect that the provider's objective is in building long term relationships with their clients, so that they know what to expect moving forward. Selling Managed Services is not a retail engagement, and this should be illustrated through the call script to set the appointment. The last thing the call script should explain to the prospect is what will happen next.

Next steps

The appointment-setter should next inform the prospect that they will receive a calendar invitation to the appointment, providing all parties with the proper communication channels and contact information in the event of an unforeseen schedule change. Also, the prospect should be informed that they will receive an appointment-confirmation telephone call within the next 24 hours, as well as 24 hours before the date of the appointment. This activity impresses upon the prospect the provider's customer service philosophy and the value they place upon the prospect's time as well as their own.

Leaving voicemail messages

The appointment-setter will leave more voicemails than they will conduct meaningful conversations with prospects; therefore, an effective appointment-setting script must include a brief, interesting voicemail narrative and technique to compel the prospect to return the call. One such technique is called the Intentional Hang-Up, which has shown to be effective in certain situations, and "games" the prospect into returning the call. What the appointment-setter will do is state their name, company and phone number, and proceed to leave a message asking for a call back regarding…*then abruptly hang up*. The prospect will assume the appointment-setter was leaving a message and somehow got disconnected before they could finish, and many times will call back simply to give the appointment-setter the opportunity to finish what they were trying to say on the voicemail.

Another effective technique is called the Ambiguous Message. The Ambiguous Message is based on a concept similar to the Intentional Hang-Up. This technique leaves the prospect hanging by not revealing everything about the reason for the call - as that is what is keeping them from returning it. For example, "Hello Mr. Prospect, my name is Brandon and I have a question about your system that I think only you can answer. Please call me back at 555-123-4567 as quickly as possible. Thank you." A message like this can work very well for several different reasons. First, it does not reveal the company that generated the call, so the prospect is curious as to what the call is regarding. Next, it states that only the prospect can answer the question, so the matter sounds urgent. Lastly, the prospect is asked to call back quickly, so they feel compelled to do so to find out what the situation is all about.

The next voicemail technique that has shown success is the Implied Referral, and will require a bit of research and time with the Gatekeeper. First, the appointment-setter intentionally asks for the wrong person – usually someone in accounting works well. When they are transferred to that person, they are going to politely introduce themselves and let the accounting staff member know the reason for the call – to ensure they received information regarding the provider's IT products and services. Now, obviously accounting will then say that they don't typically handle this type of thing, which will prompt the appointment-setter to politely ask for the correct individual. After they receive this information, the appointment-setter then requests to be transferred to that person. Whether they reach them or not is unimportant, however the chances of reaching the true prospect are now much greater, as the call is being transferred from an internal extension that is not the Gatekeeper's. Once the appointment-setter begins to engage, they let the prospect know who they were speaking with and from what department. For example, "Hello Mrs. Prospect, I was just speaking with Joe in accounting and he felt it was appropriate for us to have a conversation". If leaving a voicemail, an effective message may be: "Hello Mrs. Prospect, I was just speaking with Joe in accounting and he felt it was appropriate for us to have a conversation. When convenient, please call me at 555-123-4567." This leverages the relationship between a specific department and staff member to increase the appointment-setter's credibility and chances for a call back.

Conclusion

An effective appointment-setting script and technique will:

- Help navigate past the Gatekeeper
- Establish the service provider's credibility
- Portray the service provider as the answer to the prospect's pain
- Properly lead prospects through a consistent sales experience
- Arm sales professionals with the information they need to close business
- Prepare the prospect for the close
- Increase appointment closing ratios
- Shorten sales cycles