

RFI Tips for B2B Lead Generation: Appointment Setting

15 Questions to Include in Your Next Vendor RFI



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What You'll Get From This Guide

How do you know which appointment setting vendor is right for you?

Vendere Partners has developed **15 key questions** that you should ask any potential lead generation or appointment setting provider before you sign on the dotted line. And we haven't stopped there: we've also provided you with insider tips on what to look for in a potential providers' responses.

We've designed all this information to help you remove stumbling blocks from your evaluation process, give you a good look behind the curtain, and weed through lead generation companies' jargon and ad-speak.

Ask the questions in your next request for information or request for proposal, and use the tips to assess your potential lead generation or appointment setting partners' responses.



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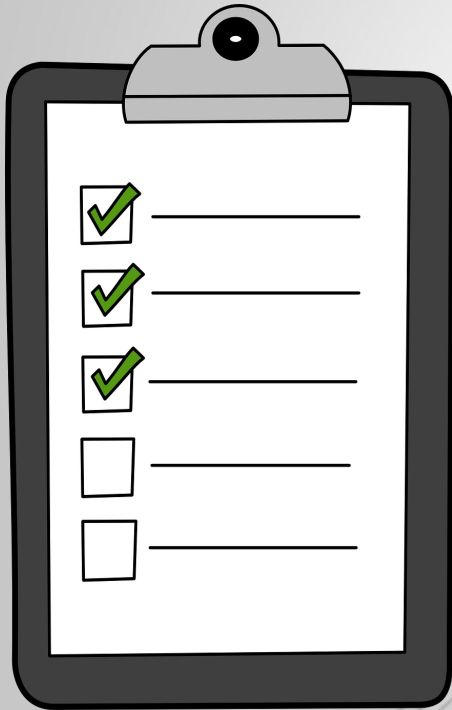


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Question 1: Do you have experience in my industry and access to the lead data required to run appointment setting campaigns in my space? Please provide examples.



Answer: It is very important for any potential appointment setting provider to:

- Have experience in your space.
- Understand your company from your perspective.
- Understand the lead data that will be required to run your campaign.

Does your potential provider possess the experience and the data? Ramping up is hard enough; having bad data will just make things more difficult. If a prospective provider reveals that it asks customers for data, asks to buy leads lists, or that it adds buying leads lists in its costs, **RUN!**

Question 2: When it comes to appointment setting, what sets you apart from the competition and ensures quality conversions?



Answer: You want to know how the provider will present you with appointments that will result in a high ROI.

Look for the following in a provider's answer:

- Explanation of how it is able to shorten the sales cycle.
- Offer of proof that it has a track record of high appointment-to-opportunity conversion rates.
- Shows that it understands the value of keeping your internal sales team busy with appointments rather than busy making cold calls or calling unqualified leads.
- Emphasizes scalability.
- Makes mention of reporting that will hold its team and yours accountable.

You should consider a response to be of considerable merit if it includes these points.

Question 3: Do you offer recordings of scheduled appointments?

Answer: If your provider is calling states in which it is legal to record conversations, your provider should be able to present you with recordings calls that:

- Convey the quality of the caller's presentation.
- Uncover the level of interest and commitment of the lead.
- Contain solid information regarding the date and time of the appointment and the prospect's expectations.

Recordings of scheduled appointments are invaluable because they give you true insights into your target audience's wants, needs and expectations while helping you develop your own internal campaigns.

In addition, making recordings available to you shows that the provider is confident and transparent about its efforts and results.



Question 4: What criteria do you use to qualify an appointment?



Answer: An appointment setting vendor should work with you to determine the criteria used to qualify an appointment.

Listen for their approach to consultation and scheduling communications with you. A provider should work with you to determine:

- **Titles** of the prospects or leads that would be most beneficial for you to target.
- **Purchase price** you require and the purchasing ability of the prospect or lead required.
- **Expectations** that need to be set and understood between both parties. (i.e., what you hope to get out of the appointment and what the appointment should hope to get out of you.)
- **Immediate wins and repeat business** you're hoping to achieve and the ability of leads to provide you with quick wins and ongoing business.
- **Value of leads** based on geographical location.

Question 5: Can you break up payments to accommodate our cash flow or budget cycle? We prefer to pay as we go as opposed to making one big payment and hoping that appointments show up.

Answer: Many performance-based lead generation companies make appointment setting look easy, but want ALL of the money upfront. On top of that, they leave it up to you to try and get your money back. You should question any performance-based model (keeping in mind that many of them are legitimate) and any guarantees.

Remember: If a provider guarantees appointments easily, it should be able to break up payments just as easily.



Question 6: What levels of sales and marketing experience do you have?

Answer: Appointment setting is just one piece of the lead generation puzzle.

If you anticipate that down the road you will need event audience acquisition services, high-level e-mail marketing, assistance with sales and marketing collateral development, and perhaps even an outsourced sales team that actually closes sales on your behalf, you need to know if your potential appointment setting provider will be able to grow with you and meet your needs as time goes on and you move forward.

You don't want to invest time and money in an appointment setting provider only to find that later on you have to invest in yet another third party to meet your additional sales and marketing needs.



Having a partner that not only knows how to schedule appointments but that understands omni-channel approaches and is able to actually close opportunities is a big plus. Going with a partner that can only schedule appointments or leads results in a lot of introductory calls that have no meat to them. You want to work with an organization that knows what an opportunity really looks like, can provide results now, and grow with you down the road.

Question 7: Tell me about your team and company. Have you sold what we sell before starting from opportunity identification all the way to closing, invoicing and collecting?



Answer: The majority of lead generation companies manage call centers with varying levels of success, but don't actually have experience selling solutions on behalf of their customers. A response to this question should give you:

- An understanding of, what, where and to whom the company's been selling.
- How long it's been selling products and/or services like yours.
- The potential provider's leadership.

Managing a call center is one thing; having a proven ability to sell is another. If a provider has a track record of selling successfully, you can bet any call center services it offers are going to be better than those of a provider that does not have significant selling experience.

Question 8: Who are some of your current clients?

Answer: There might be a lot of different answers to this response that would suggest a potential partner would be a good fit.

If your business has a very specific niche, a potential partner that is highly specialized in your space might be ideal. On the other hand, if a potential partner has an extremely diverse portfolio, this might be favorable as well. This could mean that the potential partner is able to adapt easily and has the expertise required to source the right people for a number of different types of businesses and their various campaigns.



Whether a potential partner is highly specialized or has a diverse portfolio, one thing you want to watch out for is the company sizes of their clients. If you want to grow, a potential partner that's worked with start-up companies and with global companies that have many channel partners is probably going to be able to grow with you and provide the service levels you need much more easily than a partner that's only used to working with organizations that are all similar in size.

Question 9: Can you offer us any business contacts for referral purposes?



Answer: Looking for specializations and/or diversity when it comes to a potential partner's business contacts, which may include customers, partners, vendors, suppliers and others, is a prudent thing to do.

The biggest mistake that companies make when they do obtain references from potential partners is neglecting to actually contact the references and ask detailed questions about those references' relationships with the potential partner and about any noteworthy positive and negative experiences they may have had during various engagements.

Contacting references and asking pointed questions is a great way to get a realistic picture of a potential partner's strengths and weaknesses.

Question 10: Where are your call centers and teams located?

Answer: Watch out for potential partners that sell what you perceive to be local talent but actually outsource their appointment setting services to a third party in another country that may represent you poorly or not be able to deliver what your potential partner has promised.

Unless you have specific reasons for wanting to outsource your appointment setting needs to a third party in another country, insist on local talent that has been vetted and trained by your potential partner.



Question 11: Do your team members work from home independently or do they work in a team atmosphere?

Answer: The cost-savings gained by using appointment setters who work from home are gained by the potential provider; no significant savings will ever come back to you.

Telemarketers or appointment setters who work from home almost never make the number of dials a day that callers who work in a team environment in an actual call center or office make. It is very difficult to maintain high levels of productivity and hold off-site callers accountable for the levels of service they're providing.

You should always insist on being provided with appointment setters who work in a team environment.



Question 12: How long have you been in business?

Answer: When there are more poorly performed services than quality services in a particular industry, such as there are in the lead generation industry, it is important to understand how to separate the good services from the bad.

If a lead generation company is short on experience, it's a huge red flag. The company may be decent or even good at cold calling, but terrible at managing a team and campaigns. The company may be good at cold calling but have no lead data to support its efforts. The company may not know the difference between a good team of lead generation and appointment setting professionals and a bad one.

There are many things that come with a lack of experience that will make it difficult for you to get the results you want and need.



Find an experienced company that has endured as many bad experiences as they've enjoyed good experiences. At least 29% of new lead generation businesses survive 10 years, with the largest drop in business happening within the first 5 years. We recommend that you work with a company that has been in business for more than 10 years.

In addition, you should look at the history of company and the types of customers the company has supported. What types of customers has the company served and what types of lead generation campaigns has it run? What kind of growth has the company experienced? What trends do you see?



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Question 13: What types of reporting do you provide?

Answer: Look for what you want. Do you want weekly, bi-monthly, monthly, or quarterly reports?



Consider the scope of your engagement. The main thing to look for in response to the question of reporting is whether or not the potential provider is capable of providing reports that are:

- Accurate and discernable (without the provider's help).
- In your preferred format.
- Within timeframes that make sense for your business.

Question 14: What do you cost?



Answer: You will see performance-based pricing, fixed pricing and shared risk programs (usually when they're selling for you), if you're lucky.

Go with what meets your needs and makes you feel comfortable. However, keep in mind that you will typically get what you pay for.

If you go with a performance-based pricing model, take a close look at what's in the contract, including all of the terms, delivery timeframes and quality assurance. With this model, you are only paying for appointments. All data gathered throughout the appointment setting process and scheduling, including e-mail requests and follow-ups, will remain with the vendor. After all, the provider has to give you a reason to keep you coming back.

One thing to be particularly wary of is long-term bundles, which are most easily identified by statements like, "Hey, buy these 100 appointments for \$500 a piece." Have you ever heard of the phrase, "til the cows come home?" Long-term bundles can go on and on and lock you into an agreement that may not yield the returns you need. And you assume the majority of the risk!

That said, fixed bundles can be long-term solutions, and usually do include the delivery of valuable data to you, the customer. If you go with a long-term bundle, the bottom line is that you have to trust your partner and have good reason to trust your partner. If trust needs to be earned, start with a short-term performance/bundle hybrid engagement before you commit to a more traditional approach or long-term agreement.

Question 15: What kinds of data do you share?



Answer: The potential appointment setting provider should supply you with the extremely valuable lead generation data that is gathered throughout your campaign.

While there are times that customers want to target specific accounts for which they already have information, we always append this data with the highly accurate contact information that we are able to glean through several proven sources including our proprietary database, which is at least 85% accurate at any given time.

Most customers don't touch their data frequently enough to ensure this accuracy. At Vendere, we make 10,000 touches a day, and that keeps our data clean.

Cleansing the data before it can actually be productive delays results. If you're looking for a lead generation/appointment setting vendor, you're probably tired of waiting and want quick wins. You should always go with a potential vendor that can give you those fast results and provide you with accurate contact data.

What Can You Take Away From This Guide?

When you're in the process of deciding which appointment setting vendor to trust for your business's lead generation needs the choices can seem overwhelming. All the questions in this guide boil down to accomplishing several key objectives in your search for the best provider:

- Making sure they can truly give you the results you need.
- Finding out if the potential provider can deliver in a way that ensures the best outcomes for your business.
- Knowing all the information you need to have to minimize surprises.

We hope these questions will clarify the important points you should touch on in your next appointment setting vendor RFI.

If you'd like to ask these questions of the Vendere Partners team, you can contact us using the information below, or [fill out an online form](#). We'd be happy to answer these and any other questions you have and show you how we can deliver quality leads for your company.



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