

MKTG 4600 – Advanced Selling Strategies

Appointment Phone Call Assignment Description

PURPOSE / LEARNING OBJECTIVE:

The purpose of this assignment is to have each student make a phone call with the intent of practicing appointment setting technique. Sales phone calls are common prospecting methods, and sales success can often hinge on successful prospecting. Thus, this assignment is designed to build the phone calling skills of the students, which in turn should enable the students to be more successful prospectors.

THE TASKS

There are two tasks to this assignment: a practice call and a call to me. Each is discussed below.

Student to Student Practice Phone Call: As a way to get more practice at making appointment setting phone calls, each student will be paired up with another student (I will assign teams) and each of you will have to call the other and execute the same role-play as described in the “calling Dr. Eckert” section. Thus, each student will take a crack at role-playing the prospect and role-playing the salesperson. You will need to agree on a time to execute the calls before the deadline. Each role is discussed below:

- **SALESPERSON:** You should call the other student at the pre-arranged time and be in character as the salesperson for NetSuite. You should attempt to obtain an appointment for the following week. You should remain in character throughout the entire phone call and hang-up without ever breaking character.
- **PROSPECT:** You should answer the phone at the pre-arranged time and assume the role of the National Sales Manager for IIG insurance. You should react to the salesperson as naturally as possible and also play the role of manager. You are required to give this person at least two of the objections listed in Chapter 5 (Appointment Setting). You CANNOT tell your practice partner which two you will be using. As the salesperson goes through their attempt you should also be writing feedback on the feedback form. As soon as the phone call is completed you should add additional notes and feedback that you did not have time to complete while the call was going on. You will also give your partner two scores; the first is whether you believe they would have gotten past the first 30 seconds of the call, and the second is the “would they have actually gotten an appointment” scale at the bottom of the feedback form. Please be realistic and honest with these scores. The grade you receive will be based on the quality of the feedback you GIVE to your partner, not how highly rated you were as salesperson (that will end up impacting how well you do when you call me). You will need to turn in the feedback form on the date indicated on the syllabus.

Notes:

Roles / Names: All the information on IIG and the role of the National Sales Manager as outlined on the “Insurance Industry Register” document is fair game to use in the practice session. However, use each other’s actual names, versus trying to pretend you are me when playing the prospect.

Make it Real: When making the calls you should be in separate rooms and use actual telephones. I know we will do it differently in class, but you should make this as realistic as possible and thus please follow this rule.

Honor System: Ultimately you and your partner are on the honor system for this assignment. But since I assume you take this class seriously I am not worried about it. Employers have encouraged us to include more phone work in our SBM courses and thus this assignment attempts to respond to that. Fudging this assignment ultimately only hurts your chances for grading success on the call to me and professional success when you hit the “real world.”

Calling Dr. Eckert:

This component of the assignment is designed to mimic a realistic appointment setting environment. Dr. Eckert will play a typical prospect and it will be your task to attempt to gain an appointment with him. Details of this assignment are addressed below.

- **The Call Itself:** On the date indicated on the syllabus each student will need to call and attempt to get an appointment with me based on the phone call scenario that is the last page of this document. This phone call is a role-play, so students should remain “in character” and treat this like an actual prospecting phone call. Each student should attempt to schedule a 30-minute appointment with me on the Monday, Tuesday or Wednesday of the week following the phone call day (refer to a calendar for the specific dates). I WILL ONLY ALLOW APPOINTMENTS ON THESE DATES, so if you don’t pay attention to those dates, you will be dead before you begin. We will not actually meet during this time, but I want you to shoot for a specific date/time to improve the realism of the role-play.

NOTE: Students should call me at my **WMU office phone: 387-5799**. I will not return calls – it is your responsibility to call me at my office at the specific time you signed up for. Lastly, even though some of the calling time slots are in the evening you should act like you are calling during normal business hours. In other words act as if it is normal to call a B2B prospect at 8pm.

- **Signing-Up for The Call:** Each student will sign-up for a specific time slot. The sign-up form for these calls will be available in-class approximately 2 weeks before the actual assignment. If students fail to sign-up, they will receive zero points for the assignment. Students who do not call during the time they selected will also receive zero points.
- **If Unsuccessful?** If you are unsuccessful gaining an appointment with me during your scheduled time, you must call back during my next scheduled office hours (again you will need to figure that out). There is no schedule for this time period; I will answer on a first come-first serve basis. You should treat this make-up call as a completely new call: pretend you never called the previous time. Thus, you get to start with a clean slate although your need for a second call will be factored into your grade.
- **Preparing for the Call:** Students should review the “Insurance Industry Register” document (on course web site) to gain an understanding of who I am for the purposes of this role-play phone call (I am not your professor!). One note on that – the dates are old, just assume that that article came out recently and the dates are current. You should also review the “phone call scenario” that is the final page of this assignment description. In addition, each student should familiarize themselves with the NetSuite CRM product. Students should also review Chapter 5 on appointment setting.

THE GRADING STANDARDS:

- **On Time:** It is simple: for the practice call, get the calls made and the feedback form turned in by the required date, and for the call to me, make the phone call during your scheduled time. If you miss either deadline you will receive zero points for that part of the assignment. For the call to me, second attempt call-backs (if necessary) must also be made during the scheduled time window.
- **Professionalism:** Both calls should be made in a professional manner. Remember you are not calling to discuss with your instructor or a classmate how you would make a call. You are actually making a call, with the intent of obtaining an appointment.
- **Success:** For the practice call you will be graded on the quality of the feedback you provide to the other student as evidenced by what is on the feedback form. For the call to me success is simply evaluated: do your efforts result in an appointment? In other words, if this were an actual business situation, would I have scheduled an appointment with you? In addition to this purely outcome based component of the grade, I will also consider the quality of each stage of the phone call. That will be judged on how well you execute the techniques covered in Chapter 5.

Your Name: _____

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Name of Salesperson who called: _____

Date & Time of Call: _____

Overall Level of Professionalism:		
Quality and effectiveness of the Hello		Would you have made it past the first 30 seconds in the real world? NO -----YES
Quality and effectiveness of the introduction		
Quality and effectiveness of the reason to meet		
Quality and effectiveness of the direct ask And the re-ask after objections were handled		
Quality & effectiveness of how they handled objection #1 O1: _____ Quality & effectiveness of how they handled objection #1 O2: _____		
Quality of summary & exit		

Overall Rating: Mark the number you think best represents their performance:

In the real world, if the call had gone as it did what are the chances you would have given this person an appointment?

1	2	3	4	5	6	7	8	9	10
Not a chance they would have gotten an appointment				50/50 chance			Definitely would have gotten an appointment		

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APPOINTMENT SETTING PHONE CALL SCENARIO

To be used for both the practice call and the call to Dr. Eckert

NOTE: see the assignment description and the “Insurance Industry Register” for more information related to this assignment. Students should also review the NetSuite product information and Chapter 2 on appointment setting.

PHONE CALL SCENARIO (for all students)

YOU: You are a direct sales representative with NetSuite CRM software. You are in your second year and you sell both NetSuite and various installation & training packages that go with the software.

ME: I am the person described in the “Insurance Industry Register” document. Other than that, you know nothing about me and we have never interacted before.

SCENARIO: Based on a request from your boss, you are making a cold phone call on me with the intention of getting an appointment with me to discuss my needs and your solutions related to customer contact software (ACT!).

ROLE PLAY: Start the phone interaction when Mr. Eckert comes on the line.

Notes:

NetSuite doesn't really have a direct salesforce such as this, but that is not a problem for this role-play.

You should definitely visit NetSuite on the web. Remember, you are selling just the CRM product. I suggest taking the salesperson and sales manager views of the “Role-Based Demo” (see far right column for this link). The web site is: http://www.netsuite.com/portal/products/crm_plus/main.shtml

In the real world, most of the installation and training packages are sold through 3rd party consultants, for the purpose of this role-play, pretend that NetSuite provides those services directly.