


Gaining Appointments

Without appointments you never get the chance to sell.



Meetings Suck!


- Your job is to call other people's meetings.
- You interrupt their day to ask them to have a meeting with you and if that goes well their reward is another meeting!
- Until new ways of making decisions emerge – this is the reality of selling.



Sales Funnel Metrics

- **Connection Rate**
 - Dials to Conversations
- **Conversion Rate**
 - Conversations to Meetings
- **Closing Rate**
 - Meetings to Sales

Small changes can lead to large performance increases



Other Ways to Generate Conversations



- Referrals
- Networking
- E-Mail
- Snail Mail
- Newsletters
- Web Sites
- Face-to-Face visits

I recommend using multiple methods and also using a combination of methods

Phone Calls: Big Picture



- Not Fun: but it can work
- Bad Reputation: thus must be very professional and non-pushy
- Persistence Pays Off: most sales people give up too early.
 - What is the appropriate number of call backs?
- Critical Job Task: should be treated as such.

Phone Calls



- Purpose:

GAIN APPOINTMENTS

(not sell your product)

- “Qualification” may be appropriate, but no selling!
- Methods: unscripted sounding scripts.

The Barriers: Voicemail



- Be quick, be strong, be persistent
 - Referral Approach
 - Media Reference
 - Success Story
 - Critical Business Issue
- Do NOT overpromise – casual confidence and problem solving tone.
- SLOW with names & numbers

The Barriers: Gatekeepers



- Always be polite & never lie
- Ask for help
- Sell them on the idea of letting you through (don't sell your product)
 - Success Story
 - Promise to be professional & productive
- Respect their job – just be very persistent (wear them down with polite and friendly persistence!)


The 5-30-5 Approach



- 5 Seconds to connect as humans
- 30 Seconds to create business based curiosity
- 5 minutes to sell the idea of a meeting
- Most failed calls will happen in that first 30 seconds.

The Basic Script


- Hello
- Curiosity Creating Introduction
- Reason For Call
- Reason to Meet
- Direct Ask
- Full Confirmation



The Basic Script

Hello


- Say Hello and allow time for response
- Slowly ID yourself
- Ask for Permission
 - Can I borrow about 3-4 minutes of your time?"
 - NO: When might be a better time (the rationale behind the call is.....)
 - YES: "Thank-You, I appreciate that"



The Basic Script

Qualify (optional)


- Fishing: (Trying to seek out the right person)
 - "Can you help me..... I am trying to contact the person responsible for"
- Full Qualify: (think this is right person)
 - "Are you the person responsible for"
- Partial Qualify: (pretty sure this is right person)
 - "I understand you are the person responsible for, is that correct?"



The Basic Script _____

Create Curiosity


- What are the strongest 1-2 reasons this customer would like to keep listening?
 - Biggest Value Points
 - Referral or Affiliation
 - Recent Success
- You should be able to express this in under 20 seconds.



The Basic Script _____

Purpose of Call


- Let the person know the specific reason you called: to potentially set a F2F meeting
 - Get this on the table early to remove uncertainty and defensiveness
 - "The reason I am calling is to see if it makes sense to get together face-to-face to discuss X"



The Basic Script _____

Reason to Meet


- As an extension of the curiosity creating introduction, briefly and strongly present your case for why a meeting would be potentially valuable to this client
 - "As I mentioned, we recently worked with a biotech firm"
 - "I mentioned I was speaking with X and the reason he thought you and I should speak further..."
 - "As I mentioned, we have developed a familiarity and expertise with X market"



The Basic Script

Direct Ask


- Directly ask for a specific meeting date & time ("Can we meet Tuesday at 2pm?")
 - Why Specific???
 - Works with your goal of efficient territory travel
 - Easier for buyer to respond to
- Work more open from there
- Be ready for objections to the meeting



The Basic Script

Full Confirmation


- Get meeting details firmly set
- Repeat your name / company
- Express enthusiasm
- Arrange for a confirmation email or phone call
 - Ask for their communication preference
 - Get or confirm email or phone number



Objections

- Brochure
- No Need
- Happy
- No Budget
- No Time

These are objections to a meeting – thus treat them as such and work towards turning them around into a meeting



The Typical Objections _____

Send the Brochure

- Sometimes you have, you always can, but.... This is mainly a blow-off
 - So, at first, blow off the blow off
 - “It is often more productive to get together face-to-face, can we schedule....”
- No, really, send me the brochure....
 - Ask a question to start needs ID
 - “What insurance products do you currently carry?”

The Typical Objections _____

No Need / Not Interested

- This is where you have to push them to rethink this just enough to agree to a next level conversation
 - **Feel-Felt-Found** can work here...
 - “You know many of my current customers felt the same way, but after a quick initial conversation we found opportunities to work together and now they are glad they did”
 - You may have to explain what happened to change the past customers' minds.

The Typical Objections _____


Happy at this Time

- True or they would have been looking.
- You must get them past their inertia...
 - **Start with “Great” (language & attitude)**
 - **Don't claim you can do better (too early)**
 - **Do remind them we may still be able to work together....**
 - “That is great to hear and many of my current customers were happy when I first called them but we eventually realized there was room to help each other out....”

The Typical Objections _____

No Budget / Money


- Always an issue but for value people always find money plus some spending would simply be replacement spending
 - Acknowledge budget and then remind them the first step is to determine value
- “I certainly understand a tight budget situation, but why don't we get together and see if we can create value for your firm, and if so, consider solutions to the budget issues then.”



The Typical Objections _____

No Time


Value Argument	Meal Solution
<ul style="list-style-type: none">• “I appreciate a tight schedule, however why don't we squeeze in 30 minutes to see if we can produce the positive results we have produced for many customers. It could end up being a well invested 30 minutes.”	<ul style="list-style-type: none">• Think any/all meals• “I appreciate a busy schedule, but I also know we both have to eat, can I take you to lunch on XXXX and we can talk then?”• Breakfast sometimes works better



The Special Challenges of Calling Higher Level People


Persistence

- Will have stronger Gatekeepers
 - Voicemail
 - Dedicated Secretaries
- Will send you back down
- Should use multiple-prong approach



The Special Challenges of Calling Higher Level People


Speaking their Language



- **FAST:** Will decide quickly as to whether you are worth talking to (as quick as 7-10 seconds)
- **SAME LANGUAGE:** Must already be speaking their language
 - **Value:** hit is hard and quick
 - **Big-Picture:** critical business issues
 - Must already understand 2-3 keys to that person's business and be able to connect your product to that cleanly and concisely.
 - **NO BS:** must be willing to concede weak points yet remain overall confident


The Special Challenges of Calling Higher Level People

Using Referrals



- **References:**
 - External references: the rich get richer as strong business contacts lead to more
 - Internal References – if you can get through to a lower level internal person and get that person to refer you:
 - Problem Owners
 - Convenient Point Person
 - In either case they must have internal respect

Making This Work



- **Practice**
 - Create & rehearse script
- **Set "Sacred Time"**
 - Set and keep calling time in schedule
- **Set Physical Space**
 - Create space conducive to calling
- **Track Results**
 - Quick record + analyze weekly

Final Reminder



- Your Goal is to **GAIN APPOINTMENTS**
- Not Sell!
- NEVER forget your goal!

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