

## Making Calls to Set Appointments

Write a practice script including a quick introduction of who you are and what your company does, the purpose of your call, and the date and time you'd like them to check on their calendar. Then, practice aloud or with a friend by making an imaginary call and asking for feedback.

### Practice Script: Setting Appointments

Identification statement

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Purpose of the call

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Request for the appointment

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## Keeping a List

When making prospecting calls, it is useful to have a quick and easy reference map for yourself. I recommend the following Prospect Contact Log to track who you spoke to, where, when, what happened, and what's next:

### Worksheet: Prospect Contact Log

Contact name & title	Company	Date of contact	Result of call	Next Steps

NOTES:

## Tip Sheet: Appointment Setting

- Goal: Make the appointment and then get off the phone.
- Remember the purpose of your call -- getting the appointment. Avoid drawn out discussions and don't attempt to sell the prospect on the phone.
- Give the prospect a reason to see you and find the reason to see them. "We really should get together..."
- Request a specific date and a time for the appointment. Get the prospect to open his/her calendar. Return to that date and time request (or propose another specific time) after each question or objection.
- Understand the numbers game and set personal goals.
- Use your script.
- Be honest--do not tell the prospect that the meeting will take 5 minutes when it will take more time.
- Be prepared for objections. Practice your responses.
- Smile! Get a mirror for your desk.
- Remember the ONE rule: Offer No Excuses...just set the appointment and get off the phone.
- Don't call the same leads too often.
- Leave messages that allow you to remain the driver of the process: "I'm sorry I missed you, if I haven't heard back from you by next Wednesday, I'll try you again then".
- Ask the gatekeepers for help.
- Use third parties and referrals to get through.
- Always begin with the most senior person who could possibly use your services.
- Ask for the prospect's help to better serve him or to better understand the organization's decision-making processes.

