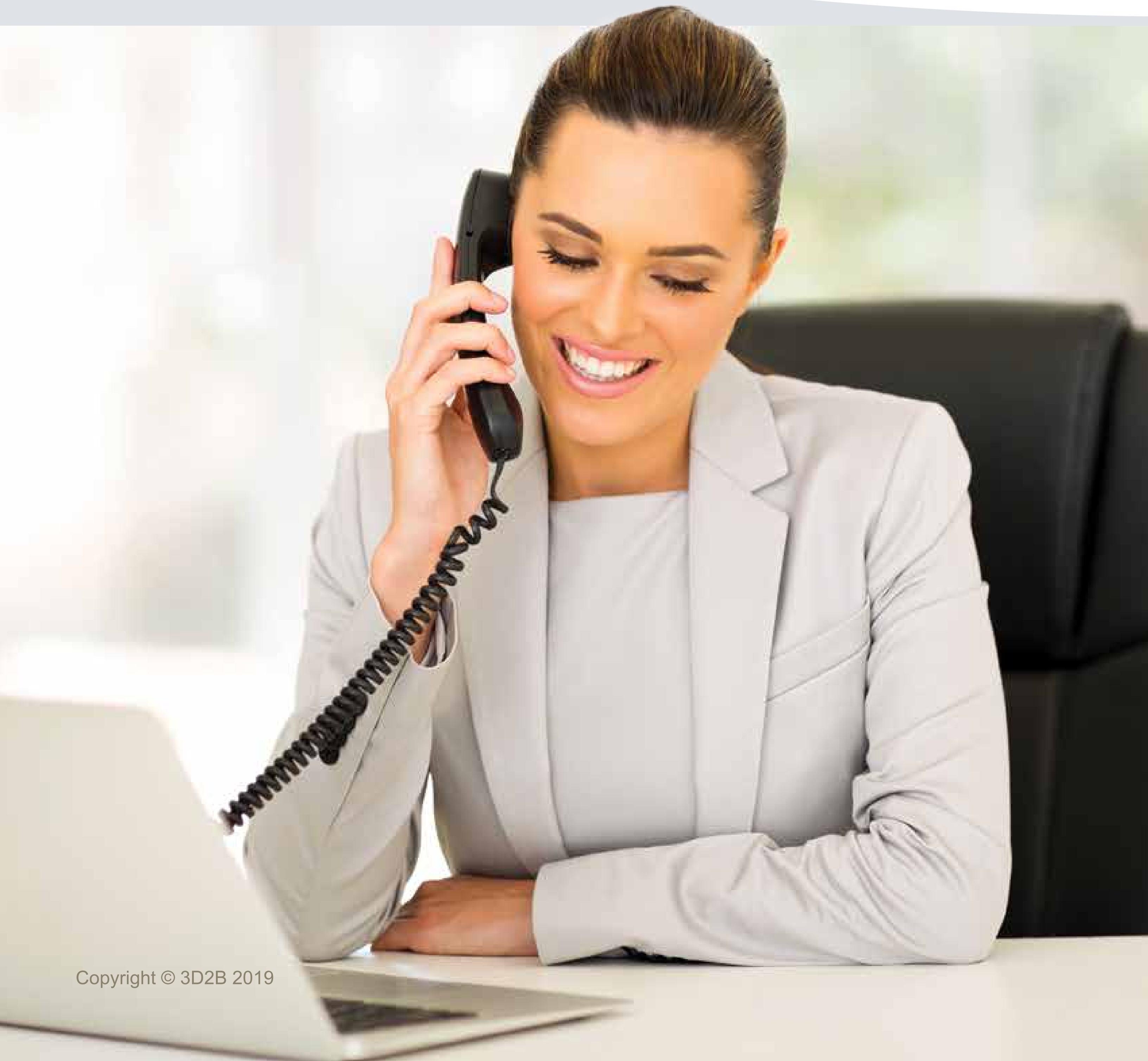
BUILDING THE BRIDGE TO SALES

The Essential Guide to B2B Appointment Setting

How to Create an Effective Appointment Setting Campaign



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The Human Touch

Without a doubt, technology has become a great tool for improving the effectiveness of B2B marketing. Social media, marketing automation, mobile marketing, and search engine marketing all aid in efficiently generating a high volume of leads. Whether marketing teams support sales efforts by generating and nurturing high-quality leads or following up on events, technology can make their work more efficient and productive.

However, smart businesses know that purchasing decisions are made by human beings who respond to personal interactions with other human beings. Though many simple business transactions can exist entirely online, effective marketing practices must include a human touch.

In particular, applying a human touch is important when it comes to supporting sales teams by setting well-qualified sales appointments. Taking the extra time and effort to approach customers with a personal touch goes a long way towards setting effective appointments.

"... smart businesses know that purchasing decisions are made by human beings who respond to personal interactions ... ."

FIVE KEY STEPS

There are five key steps to remember when launching an appointment setting campaign.

1. Establish Your Objective

Effective appointment setting begins with a clearly defined goal. Why are you setting the appointment? What is the ultimate goal you're hoping to achieve with the contact interaction? Possible goals might include:

- Closing a deal
- Presenting a single solution or a portfolio of solutions
- Demonstrating a new twist on a familiar product
- Introducing a new product

Frequently, appointments fall into two categories, informational and qualified.

Informational Appointments

Is your company in the beginning phases of penetrating the market? Are you looking to educate or build awareness among potential buyers? If so, an informational appointment is likely your objective. At these types of appointments, sales reps meet with potential customers who are interested in learning more about your company's product or service. Sales reps enter into these face-to-face interactions ready to inform and move the customer connection to the next level.

These appointments are best utilized when you have a large portfolio that you want to share with the prospect or a very complex product that requires face-to-face interaction to best demonstrate its capabilities.

Qualified Appointments

Other times, marketing supports sales reps by setting appointments with buyers who have been more thoroughly vetted. Marketing has done the legwork to determine that the lead meets the criteria and can potentially end with a successful sale. Appointments are set with a fixed date and time and with clients who may already have a budget and a clear vision of how they can make use of your solution. These appointments maximize the time and energy of sales reps as they work to close deals.

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2. Decide Whom to Call

It's likely that your company has already determined a set of core criteria that define your target audience. Whether your buyer persona criteria are based on industry, company revenues, number of employees, or geographic location, defining your ideal buyer makes it much easier to find the right target that will make a difference to your business.

Though sometimes the right contacts can come to you through data brokers or subscription houses, frequently marketing teams need to build contact databases from scratch.

It's important for marketing teams to recognize that there are often many people involved in a purchasing decision, and sales agents need to interact with many of them to ensure conversions. For this reason, contact databases often include many contacts for each account, across many departments. As the probing and networking continues, more relevant decision-makers are brought into the process and less relevant persons move to the bottom of the list.

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Appointment Setting Best Practices

1. Establish clear objectives for what you want to achieve.
2. Research the business before the call.
3. Provide the lead with something of value (white paper, webinar) in each call.
4. Quickly communicate your value. Time is limited. Focus on the pain points and how you can fix those problems.
5. Have a backup plan. Ask for a referral or an email address to send more information.
6. Prepare for objections ahead of time.

3. Assign a Team

Once you determine your appointment-setting goals and decide whom you're going to call, you need to assign a highly qualified team to make the appointment setting calls. Finding the right people to implement your appointment setting campaign can be more difficult than it seems. Appointment setters need to:

- Have a clear and articulate speaking voice
- Be energetic and enthusiastic
- Be determined and unrelenting
- Have a positive attitude that is not affected by rejection

Your company is probably full of talented individuals who know your business well and can speak with knowledge and authority about what your company has to offer. If your talented representatives have the time and motivation, they can be great appointment setters. Often, though, your smart and seasoned employees are managing higher-level tasks and their skills are best used in other ways. Having these employees execute the appointment setting campaign may not be the best use of your resources.

Hiring a team of professionals may be the best way to ensure you have the most effective group of individuals working for your business.

There are many benefits to outsourcing your appointment setting campaign, and the above points can ensure that you find the right team to support your business. External teams that are dedicated to appointment setting have the experience and expertise to fill your sales reps' calendars with face-to-face appointments with key decision-makers, allowing your salespeople to focus on turning appointments into sales.

Here's what to look for in an appointment setting team:

- **Specialists in your company's industry**
- **Agents dedicated to your particular project**
- **Native speakers of your audience's language**
- **Significant, relevant experience and education**
- **Training in sales, telephone skills, as well as your product and market**
- **Motivated to make as many deals as possible per day without compromising quality**

4. Create Messaging

Creating an effective messaging strategy is crucial when planning your appointment setting campaign. However, it can be a complicated endeavor.

Many factors go into the creation of your messaging strategy, and your agents need to have a thorough understanding of all of them.

Strategy Factors Your Agents Need to Know

Customer Buying Process – It is essential that your messaging strategy address the customer's buying process at each step, as appropriate. Research shows that buyers will conduct 57% of the purchase process before ever talking to a vendor. Be sure you get in touch with your buyers early in the process so you can sway their decision-making.

Trends and Insights – Your messaging strategy should address any recent trends in the industry that will impact your customer's experience. Be sure to keep agents updated on the latest industry events and thought leadership.

Target Audiences – Without a solid understanding of your target audience, you can't create a messaging campaign that will speak to them. You need to address their particular concerns, identify unique challenges, and speak their language. Gaining this understanding is an essential step in the messaging process.

Competitive Messaging – Your business message needs to be created with full awareness of where your company stands in relation to the competition. Are you aware of the traps that your competitors set? What is the competition saying about you, and how do you respond to those traps? How do you differentiate yourself from the competition? Understanding the competitive landscape will allow you to create messages that resonate with your target audience and convey your company's unique value.

Objection Handling – Provide your agents with specific tactics for handling customer objections. Knowing how to reassure customers and move past objections is key to converting leads into sales.

Success Stories – Make sure your messaging includes examples of satisfied customers. These stories allow your leads to put themselves in the shoes of your current customers and get ideas as to how they might implement and benefit from your solutions in their businesses.

Start to Finish

It's essential that you determine the messaging that will be used from the beginning of the appointment setting interaction all the way through to the final confirmation and follow-up steps. What will agents say when leaving contacts an initial voicemail? Do agents send automated appointment invitations that sync with customers' calendars? What kind of confirmation email is sent when the appointment is set?

Think through and map out this step-by-step communication before the appointment setting campaign even begins. Consider testing your messaging strategy through A/B testing to make sure it's on target and resonates with your potential buyers throughout the duration of the campaign.

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Phone Calls

While you don't want your appointment setting team to follow a word-for-word script, a step-by-step progression of a sample interaction can be a valuable tool. Seeing a written sample can give the appointment setter a solid understanding of key points to cover, how to address the lead's concerns, and a vision of how to guide the conversation to a confirmed appointment.

Your company can use a step-by-step guide like the one below to help appointment setters find the right language to use during the appointment setting call. Again, the goal is not to create a script that will sound stilted and impersonal, but to map out the conversation so the appointment setter can internalize the process and use language that is genuine in the moment.

> "Your company can use a step-by-step guide like the one below to help appointment setters find the right language ..."

Conversation Stage	Comments/Language
Gatekeeper (receptionist or assistant)	Ask to speak with the prospect. Keep it short and casual, like the prospect's best friend is calling.
Prospect gets on the line	"This is ____________ with ____________. You may be familiar with our services." Attempt to build familiarity and warmth, even if it is a cold call.
Begin your 15-second pitch (you don't have more time than that)	Highlight what it is that you can offer in as few words as possible. Make it compelling so that the prospect wants to know more.
Ask engaging questions to gain an understanding of the pain points they are facing	Begin by addressing the customer's pain points. Think about the problems that your business offerings can fix. Avoid listing the features and benefits of your business. Focus on the customer's needs.
Customer responds positively	Ask questions to better understand the lead's business and specific pain points. "Tell me more about that…" "How long has that been a problem?" "What have you tried to do about that?" "And did that work?" "How much do you think that is costing you?"
Set a firm appointment	Remember that setting the appointment for further communication is the goal. Use the "funnel approach" to find the best time. "What day of the week works best for you?" "And is morning or afternoon better?" "Closer to 9 or closer to 11?" "So does 11 a.m. on ____ work for you?" "Great, I will send you an email to confirm our appointment at 11 a.m. on ____. Should you have any questions in the meantime, please do not hesitate to reach out. You will find my contact details in my email." Confirm the contact's email address. If you have a template already created, send the invite while you are on the phone with them.

Knowledge and Experience

Make sure your appointment setting agents understand your company's solutions and competitive environment. Agents need to know the solutions well enough to take the complex details of your business and translate them into simple, straightforward language. A detailed understanding of the solution will allow agents to determine just the right level of technical information that is relevant to the specific contact.

Soft Skills

Make sure your messaging is flexible enough to be relevant to the many different types of interactions your appointment setters will have. Agents need to have the soft skills to adjust their tone, pace, and level of detail to meet the preferences of their target audiences. For this reason, it's important to avoid scripting your messaging. You need your agents to have the ability to carry on a back-and-forth dialogue with the potential buyer.

Email

While your agents will primarily use the phone to make calls, it's important to keep the lines of communication open with prospects through email as well. When agents have secured an appointment, they will want to send calendar invites for confirmation and any follow-up details via email.

Alternatively, if the phone call yielded no results or if the customer responded negatively, email can be an effective way to nurture the relationship. Warm email prospecting may be the best tactic to stay top of mind without running the risk of being pushy or burdensome. Then, once the prospect expresses interest or warms up to the idea of setting an appointment with your sales rep, you can initiate a phone call to discuss the details.

5. Measure Results

Analytics are important, and you'll want to track as much data as possible so you can refine your campaign.

Making sure your appointment setting team keeps accurate records and provides detailed reports of the results is an essential part of the appointment setting campaign. You can leverage this information to increase performance and fine-tune your messaging. You can then calculate conversion rates and use that data to generate your ROI and leverage the information for future campaigns.

Data to Track

- **Phone calls made**
- **People contacted within each account**
- **Decision-makers spoken to**
- **Voicemails left**
- **Follow-up emails sent**
- **Email bounces**
- **Email opens and click-throughs**
- **Appointments set**
- **Appointments kept**
- **Ultimate conversions**
- **Reasons for no interest**

There are several types of reports that can be useful in tracking campaign data:

- Appointment contact reports
- Requests for information reports
- Daily status reports
- Individual call reports

Appointment Contact Reports

This report will include all contact information, as well as important details and notes about the lead's business, so your sales team is prepared for the appointment.

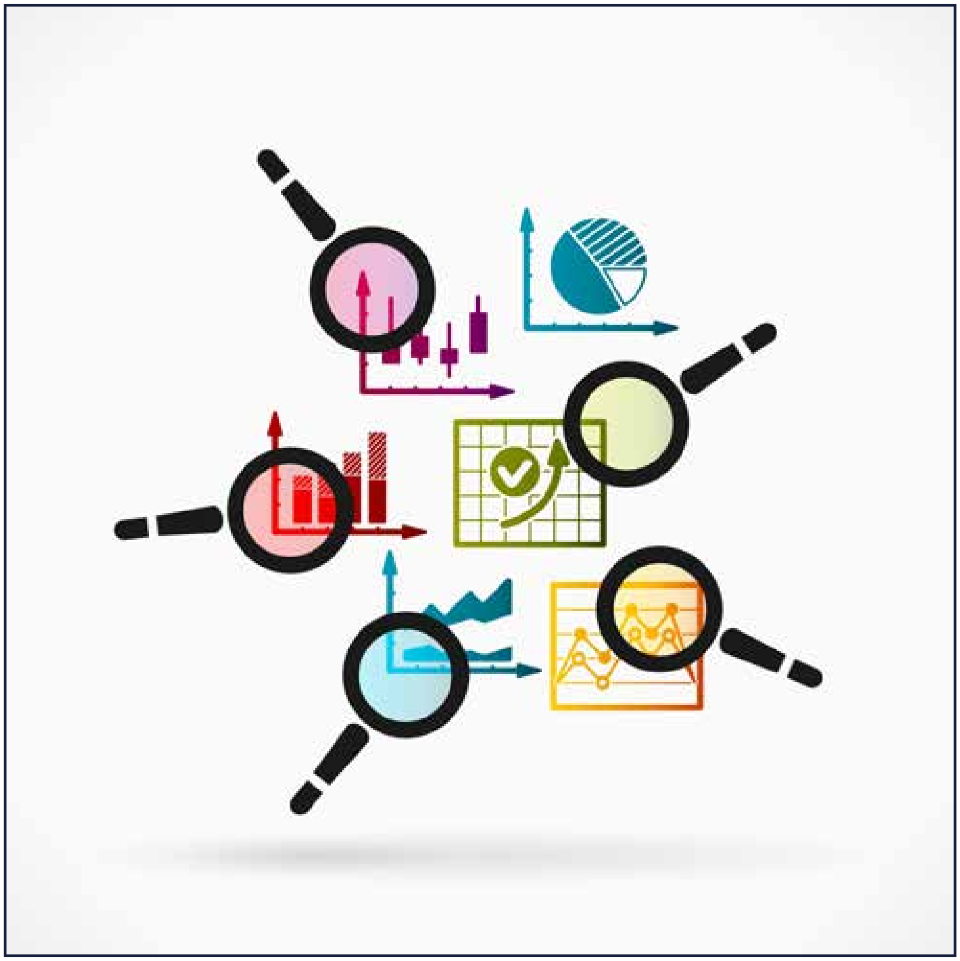
Requests for Information Reports

Appointment setters can provide addresses and specific interests for leads who did not schedule an appointment but requested information. Following up with these requests makes sure that those leads are not lost.

Daily and Live Reports

Your appointment setting team should provide a daily report of the overall statistics, and you should also have the ability to run reports live to see what is happening at any given moment. These stats can include:

- Total number of dials
- Presentations to decision-makers
- Conversion ratio
- Successes
- Cancellations
- Callbacks
- Requests for literature



Individual Call Reports

In this report, specific details of the individual calls are reported.

- Company and contact information (including individual contact titles)
- Date and time stamp
- Call duration
- Notes, comments, key discussion points
- Contact history
- Next action steps

All of this information can be easily integrated with your company's CRM software solution.

Wins and Losses

In addition to these tactical reports, make sure you capture data on your total wins and losses. Track not only the total number of wins and losses, but define what components of your appointment setting campaign may be adjusted to turn a loss into a win. Analyze the wins to see what may have been different. And as much as you want to examine those positive conversions, make sure you don't turn a blind eye to sales that were not made. Determine why leads lost interest and look for ways to keep their focus in the future.

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Data Analytics

As you can see, there are vast amounts of data that can be captured during an appointment setting campaign. It's important to track this data. It can be a gold mine of information when it comes time to develop your next campaign.

Think through how you might capture and monitor this data. Do you have a software platform that enables you to visually interact with your data and ask questions of your data? How will you go about sharing your data with sales teams and other marketing stakeholders? How will you act on the data? Defining your data process early will help you make the most of your campaign insights.

Monitor and Refine Your Campaign

Following up and getting feedback from sales reps can help support your measurement and determine how to improve your appointment setting campaign. Use this feedback and your data analytics to reevaluate the above steps to create the most effective strategy.

Conclusion

A successful appointment setting campaign requires planning and preparation. Following the steps above and remembering to approach your contacts as human beings who crave authentic, personal interactions can help you convert prospects and contacts into satisfied customers.

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About 3D2B

Founded in 2003, 3D2B is a global provider of sales and marketing services, including lead generation services, telemarketing services, lead qualification, appointment setting services and much more. With offices in Tampa and Rome, our dynamic team of industry experts can enhance the impact of your marketing and sales locally or to countries across the globe.

3D2B prides itself in the fact that its agents are highly educated, natively speak the languages they cover, and have industry-specific experience.

Connect with us:

We'd love to chat.

Contact us to see how we can help you.

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