

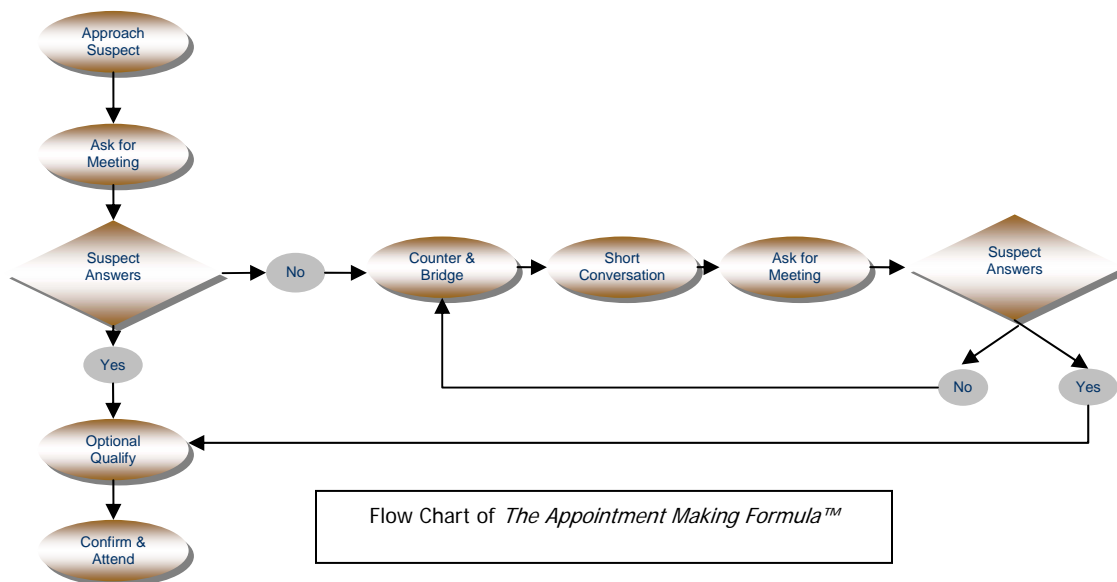
Mastering Sales Series

The Appointment Making Formula™ Workshop

The Caponi Performance Group's Appointment Making workshop is a part of the Mastering Sales Series of workshops of necessary sales skills based on the methods and techniques of some of the industry's best known sales experts.

Our methodology is holistic in nature; template based in application, and is called *The Appointment Making Formula™* (*The Formula*, for short). It is based on years of feedback from many different approaches to setting appointments to jump-start activity and sales, whether it is for face-to-face or telesales selling environments. We believe that the appointment making process is just another management challenge that can be broken down into its component parts, monitored, measured and then incrementally improved from both an effectiveness and efficiency basis. This is addressed through a combination of 'Art', which is the methodology, messaging and techniques of the process; 'Science' or the mechanics of the process; and 'Best Practices' which is a combination of both applied uniquely to your situation.

The Art



Most appointment making methodologies address only the effectiveness (Art) portion of the challenge. These traditional approaches to the techniques of appointment making, although they once worked, no longer are as effective as they once were. That is because, for most of us, the environment we're selling into has changed. Traditional techniques have you concentrate the majority of your effort on your message and then teach you to handle those first objections you receive with logic. The problem with that approach is that it doesn't work as well as you think it should. That is because of two operative laws of appointment making that virtually always apply:



1. The law of the 'Status Quo' – our research indicates that less than five percent of your universe of suspects is currently in the market for what you are selling when you call them... so they don't think they **need** you
2. The law of 'Workus Interruptus' – no matter when you call, you are interrupting that person from doing something...so they don't **want** to talk to you

Until you get them beyond the initial 'knee jerk' reaction of saying anything (including lying) to get you off the phone, logic has no place in **their** thinking. **The Formula** teaches how to get the suspect to stop thinking about how to get you off the phone for a moment, open their mind to a short conversation, and then use a set of proven, logical methods and techniques to counter their responses more effectively.

The Science

To address the efficiency challenge (Science), we encourage the incorporation of an automated tool to help in the process. The tool we recommend (Klpz) provides four key advantages:

1. It either allows for the doubling of the number of calls that can be accomplished in a set period of time or cuts in half the time necessary to make the same number of calls.
2. Because the tool was designed specifically for the task of setting appointments, the time and effort involved in using the tool is so minimal that sales professionals see the value immediately, take to it quickly, and then actually use it.
3. It **automatically** provides management (and the sales professional) with the key metrics to isolate specific areas for improving performance.
4. The pursuit of each suspect is recorded, providing the sales professional and the organization with a history of each pursuit so that the investment of time and energy are not lost when the inevitable turnover in a territory occurs.

Best Practices

Best Practices will vary by client and are designed into each workshop through up front discussions with management and selected reps or implemented in follow-through sessions after the workshop. From an art perspective, factors that determine what is taught and implemented can be as basic as whether the appointment being requested will be performed over the phone or face-to-face. It could include whether calls are conducted to attain information, or to set appointments. Some large territory environments and expense limitations may call for more qualification prior to going on an appointment. Additional Best Practices can include the setting of goals for dials, conversations, appointments, the definition of a pursuit (the number of attempts, frequency between attempts, etc.)

General

This day-and-a-half workshop will enable your company to utilize proven methods for generating leads, overcoming call reluctance, capitalizing upon referrals to penetrate large accounts, and securing more appointments with decision makers. Managers will develop a complete telephone appointment making approach with their sales team, as well as effective strategies for anticipating the conditioned responses they'll hear in order to improve their team's closing ratios and goals.



Managers will also learn how to use *The Formula* model and tools to become an effective coach, improving the success of each of their individual Sales Representatives through the concepts of setting appropriate goals and tracking specific Key Performance Indicators (KPIs) involved in the process of setting appointments. Using *The Formula's* templates, Sales Representatives will create their own individual approach for qualifying and appointment setting, build key skills necessary to generate new appointments and practice these newfound skills to assure proper understanding.

To limit the disruption from selling time, and to reinforce the techniques learned, the Sales Representatives will also actually get on the phone, make actual calls and report back their results for discussion. The result is usually more appointments on the calendar than before the workshop. Voicemail and email breaks are also built in.

Follow-Through Services

The immediate results of a properly implemented program are generally substantial; however, the longer the average buying cycle, the more chance there is that reps will lose some of their new found skills after concentrating their efforts on the deals created by the successful implementation of the methodology. To combat that natural phenomenon, the most effective form of follow-through includes a six month continuous program of tracking results, periodic remedial sessions and optional monitored phone blitzes to assure that Initial Meetings continue to be set and that the skills are continually practiced until they become second nature.

Key Elements of *The Appointment Making Formula™*

1. **Caponi Performance Group Sales Fundamentals**
 - The 'A x E = \$' formula of success in selling
 - The Key Performance Indicators (KPI) of Sales
 - Setting the proper activity levels necessary to attain your goals
 - The five ways to impact your effectiveness
 - The urgency of time in the buying cycle
 - Why hearing 'NO' can be a good thing
 - Why looking only for 'Need' will miss opportunities for sales
 - The importance of knowing who is your number one competitor
 - Leveraging the way people behave in sales situations

2. **Introduction to *The Appointment Making Formula™***
 - The Appointment Making Skills model
 - The keys to successful appointment making
 - Monitoring, measuring and managing new business revenue by managing KPIs
 - The benefits of using scripts
 - The benefit of controlling the flow of the conversation
 - Lead Generation Ideas
 - Identify ways to obtain referrals
 - The concepts behind the methodology and techniques – why these techniques work



3. **Approach Development**
 - Setting attainable goals – tools to help in the process
 - Campaign preparation – what must be known prior to the first calls
 - Call preparation - develop appointments setting approach for:
 - Warm calls (referrals, networking, etc.)
 - Penetrating large accounts
 - Voicemail, Email and Gatekeeper approaches
 - Best times to call
4. **Anticipating and Countering Objections (Conditioned Responses)**
 - Anticipate and identify the specific Conditioned Responses
 - Designing Counters to Conditioned Responses
 - Techniques for controlling the conversation
 - Introduction of the 'Bridge' Question to get suspects past the 'knee jerk' Conditioned Response and get into a short conversation
 - Focus on attaining the appointment
5. **Implementation**
 - Reinforce through role play exercises
 - Actual live calls for appointments are made during the class
 - Introduce tips to improve effectiveness
 - Use of self-contained phone system to record and play back role plays
6. **Post Workshop Follow-through**
 - Assigned post workshop 'homework' to reinforce techniques
 - Scheduled telephone conference call follow-through sessions to:
 - Track success (ratios) and trouble shooting
 - Role playing
 - Skill transfer to sales management
7. **Deliverable Tools**
 - Activity Calculator designed to:
 - Set reasonable and attainable activity objectives such as the number of dials, conversations and appointments necessary to accomplish a revenue or new customer acquisition target
 - Set reasonable and attainable quotas
 - Estimate time commitment for appointment making
 - Visual aids to assist in design of and management of calling campaigns
 - Process Flow Chart
 - Conditioned Response Handling Flow Chart
 - Homework assignment document designed to reinforce learned techniques and encourage following *The Formula's* template
 - Follow Up document for sales managers to help in reinforcement
8. **Optional Coordination with Klpz**
 - Setting calling goals within Klpz
 - Reading Call Block reports to monitor, measure and manage
 - Incorporating developed scripts, Counters, voicemail and email into Klpz
 - Best Practices can be developed and incorporated into Klpz

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