

Best Appointment Setting Process Overview

1	Define / Validate Target Audience	<ul style="list-style-type: none"> • Who benefits most from your product/service? • How does the message resonate with them? • What industries and verticals are associated with the audience?
2	Define the Benefit of the Appointment	<ul style="list-style-type: none"> • From the Contacts perspective, how will the time benefit them? • How will a meeting be more valuable than information they can find on your site or in your literature?
3	Set Clear Goals	<ul style="list-style-type: none"> • Synchronize goals and expectations with the sales team and everyone involved. • Number of Leads, Target Audience, List Validation
4	Create/Import Master Buyer List	<ul style="list-style-type: none"> • Optimize the target list against the audience, benefits, and industries to insure campaign success.
4	Set Persistence Schedule / Establish Closing Ratios	<ul style="list-style-type: none"> • Example: An appointment generation campaign may require 18 calls to make contact with the qualified buyer.
5	Optimize Campaign Process	<ul style="list-style-type: none"> • Create wireframe of appointment process from lead to opportunity.
6	Ongoing Narratives	<ul style="list-style-type: none"> • Schedule regular “team” inclusion meetings to bring agents up to date on any changes/updates to products/services as needed