



## Caller Training

The most expensive component of appointment setting is the appointment setter. And, the skills to set appointments is the total opposite to the skills to 'run' an appointment (which is why even the best field sales professionals are often terrible at it.) The Toolkit offers two options.

### **The Appointment Setting Video Series**

#### **10 Videos and Curriculum**

Callers can watch (and rewatch) these comprehensive videos to learn the unique techniques specific to MSP appointment setting. The curriculum can be tweaked to fit the caller's voice while remaining true to the techniques. Techniques cover how to control the conversation with a decision maker, plus how to work with gatekeepers.

The videos cover prospecting tactics, mindsets, metrics and how to continuously improve performance.

### **Agenda for KLPZ Cohort meetings**

These interactive sessions will follow an agenda of topics critical to the improvement of the appointment setting process. Each topic will be led by an instructor, but input, feedback and shared opinions are welcome. Members are encouraged to suggest topics for any agenda item.

#### **Skills Techniques**

As callers, we have Handling the NO in common. And the more competent we become in using the techniques to effectively convert conversations into appointments, the better. This agenda item will review one technique each week from Handling the NO and ask for feedback about the quality of the technique. The goal will be to improve, and perhaps add to, Handling the NO curriculum.

#### **Best Practices**

There are several categories of Best Practices: Operational, Calling, Reporting. For this agenda item we will review a specific Best Practice and examine its purpose, how it fits into our MSP and how best to improve on it.

#### **Mindsets**

Appointment setting can take a toll on emotions. Even knowing that impolite people don't mean it personally and understanding that success is a statistically small number, the daily effort can mess with your head. This is a group chat about staying on point mentally to be the best process operator possible.

#### **Sup?**

What's on your mind? Here the group can discuss anything they wish.

# Manager Training

Perhaps the most daunting part of installing an in-house appointment setting program is its management. Many MSPs have no experience managing the sales process, much less the very beginning of the sales process: setting initial appointments. The Toolkit offers two options.

## The Private Training Sessions

### Two 1-Hour Sessions

The objective of the two sessions is to create the best possible environment for a caller, to educate the manager on how to conduct weekly performance reviews and how to coach the caller to improve their appointment setting skills.

The agenda includes:

- A review of each element impacting the efficiency and the effectiveness of the appointment setting program and make recommendations where needed.
- Review the metrics available for performance analysis and select the most useful.
- Review a sample agenda for a weekly meeting with the caller.
- Review the Call Recording coaching strategy as a tool to improve the skills of the caller.

## Agenda for KLPZ Council Meetings

These interactive meetings with other MSP managers will follow an agenda of topics critical to the continuous improvement of the appointment setting process. Each topic will be led by an instructor, but input, feedback and shared opinions are welcome.

### Prospecting Environment

There are items we can control to make the calling environment as efficient and effective as possible. These are covered in the private sessions. That said, there is always change and new opportunities to improve the environment. The goal is to review current challenges and explore new ideas in the marketplace.

### Weekly Meetings

We will all start with an agenda for weekly performance reviews, but feedback from callers and the scenarios they encounter may require changes. The agenda will provide a forum to review challenges and find answers from the instructors or from other Council members. In some cases, the solution might be a simple tweak to a best practice, in others the solution might be to change strategies and/or expectations.

# Prospecting Software

Prospecting efficiency is the ease at which a caller can generate a conversation. Enable your caller to pursue each contact fast, easy, and precisely. According to the roadmap that you design. Don't waste their time and energy using software that makes their pursuits painful, slow and random.

## High Efficiency Prospecting Software and Process Dialer

With two screens to handle any prospecting scenario, Callers focus on talking to folks and not on software. A patented process engine, ContactScience® provides a roadmap for your prospecting team, increasing Sales Professional productivity.

ContactScience® Prospecting helps your Sales Callers pursue every contact faster, easier, and with more precision than ever before.

With the integrated ContactScience® Process Dialer every dial is made precisely to the specifications of your appointment setting roadmap. The Dialer includes:

- Click to Dial or Autodial. With Autodial the next contact is dialed automatically when the previous pursuit ends.
- Call Recording. Calls are recorded and placed on caller performance reports and in the contact's history so managers can easily listen to calls for coaching purposes.
- Optional Voicemail Drop. Callers can record their messages and play them into the contact's voicemail with a single click.

Customized roadmaps can include phone call, email, text, direct mail or social media steps for personalized and highly targeted messaging. Sales Callers can simultaneously operate multiple steps in perfect pursuit of hundreds of contacts and never get lost. A few of the caller's popular features are:

- Integrated automatic email follow-ups
- Unlimited Roadmaps, Use Simultaneously
- Email customization with unlimited templates
- Company and Private email templates
- Appointment Notification
- Simplified Activity Reporting
- Real Time Reporting
- Dedupe and Field Update Feature
- Dashboard for Teams
- Cloud BasedProspecting Environment

Managers can easily monitor, measure, and analyze performance for coaching and improvement. KPI's include Conversation Ratios, Appointment Ratios and Appointment Rule of Thumb indicators. These KPI's are also calculated without the contacts the caller removed to provide quantitative data on the quality of the list and the impact the 'quality' has on caller performance.

Marketing can assist sales with built in Direct Mail tools for postcards or lumpy mail infused roadmaps. These tools help callers to make the perfectly timed follow up calls.

# Marketing Software

Marketing can help callers set more appointments. The integrated email blast and drip tools are specifically designed to help in the appointment setting process.

## **Sales Loves Marketing**

Marketing has three specific roles to help Sales Callers when they hit the phones. These three roles assist Sales Callers in different ways; all of which are focused on generating more conversations.

### **Email Scoring**

ContactScience® integrated email marketing provides scores to highlight to Sales Callers which contacts are opening emails and clicking on links.

When Sales Callers add new names to their weekly call list (cold call or warm call,) they can review the scoring data and add contacts who seem to be paying attention to the marketing email

From a prospecting point of view, Sales does not care about the actual score; any contact with a score is more interesting to call than a contact without a score.

### **Prospecting Drip**

Prospecting Drip is an email drip campaign to keep promising contacts warm between the telephone pursuits.

ContactScience® Prospecting Drip is a series of personal emails sent automatically every two or three weeks to keep the Sales Professional in front of the contact until the next conversation.

Prospecting Drip campaigns can be created for different market segments. Typically, they are informational and educational, not salesy.

When the Sales Professional places the contact on their call list to begin the follow up calls, the Prospecting Drip is automatically paused so as not to interfere with the pursuit emails.

### **Direct Mail Infused Roadmaps**

There is a subtle, but important, difference between using direct mail as a marketing campaign and using direct mail as a prospecting touch for business development. To get maximum prospecting value from a direct mail touch, a very timely follow-up phone call must be made. To assist the caller, Contact Science provides notification when the direct mail piece has reached the postman.

Note: The Direct Mail features are included with Prospecting, but listed here since Marketing teams usually provide the content and the direct mail fulfillment. Postcard fulfillment can be done electronically by the Sales Professional.