

White Paper



5 key questions to ask

before selecting an appointment setting partner

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Approached properly, selecting the right appointment-setting partner could be the best move you make this year to provide your sales team with the leads they need to hit your sales quota.

But selecting the wrong appointment-setting partner could prove disastrous. Not only is it unlikely you'll hit your sales goals, you also may put your job in jeopardy.

With the stakes so high, we've provided five essential questions you should ask potential appointment-setting partners to ensure that they're up to the task of meeting and exceeding your high expectations.

Therefore, any firm that can't answer these five questions to your satisfaction should be immediately removed from consideration.

1

Does your appointment-setting firm offer an hourly pay model?

There are two predominant payment models in the appointment-setting space: **pay by the hour** for calls made, or a performance-based approach whereby you pay for each meeting held – typically known as a **pay-for-performance** model.

While the pay-for-performance model may appear ideal because of the minimal risks (*you only pay for the results*), a closer look reveals that this is actually **not** the case.

Performance-based model

The performance model is **less concerned about the quality** of the appointments and more the quantity – after all, these firms (*and their outbound commissioned callers*) make their money solely on how many meetings are held. **No appointment – no money.** As a result, you can easily see how a frustrated appointment setter is more likely to schedule a non-qualified lead for a meeting, just so they can earn their commission.

Also, if it appears an appointment is not imminent in a performance-based model, that caller is more likely to simply hang up and move on to the next call where their next commission opportunity awaits. This both harms your brand and will adversely impact future attempts to make inroads with this prospect.

Hourly pay model

By using a firm employing an hourly pay model, you **avoid unqualified appointments** because the scheduler has no incentive to make them. Additionally, the hourly caller has time to **build rapport** that is so crucial to building trust with the person on the other end of the phone. Not only does this increase the likelihood of a positive outcome, but it also typically results in the appointment-setter **enhancing your brand in the eyes of the prospect** – even if an appointment is not ultimately scheduled.

2

What experience do you have in my space?

Every industry has its own idiosyncrasies – *be it jargon, common objections, or expectations*. Without a thorough understanding of what to expect when making calls for appointments in a particular industry, an inexperienced team is going to have a steep learning curve. And, this inexperience is likely to cause the callers to quickly burn through your valuable database as they get up to speed.

Conversely, when you partner with an appointment-setting firm who has successfully ***worked in your space***, they can draw upon scripts that have a proven track record, know when (*and when not*) to call, and are aware of the titles and roles of decision makers they are speaking with.

In short, your ramp-up time is minimized, the overall quality of your appointments is higher, and the integrity of your treasured database is preserved.

3

Are your appointment setters experienced?

With an hourly model, the callers tend to have significantly more calling experience with the same employer than performance-based callers. **Why?** Because hourly callers have job security with a steady paycheck. Their compensation does not fluctuate based on the number of appointments they set. Pay-for-performance callers tend to float back and forth among the countless call centers that are **more concerned with the quantity** of the booked appointments, rather than the **quality**.

The reality is, the quality of the callers is of paramount importance. **Therefore, selecting a firm who can demonstrate to you that their model not only attracts – but also retains exceptional appointment setters, should be given preferential consideration.**

How experienced is the management team overseeing my campaign?

4

I can understand why you might be skeptical about including this question on your “essential questions” list. However, minimizing the value of an experienced appointment-setting veteran – *preferably one with more than 20 years of in-the-trenches know-how* – would be a huge mistake.

The ability to manage callers to keep them focused on setting quality appointments, protecting your brand during the process, and knowing how to tweak campaigns to improve results without compromising quality are not skills learned overnight. Instead, they are acquired over a career dedicated to perfecting the art of appointment setting.

So, don't be shy about demanding to know who exactly will be in the call center overseeing your campaign and what their credentials are.

5

What are the hidden costs?

You should never have to probe when trying to get the full cost of your appointment-setting campaign. Your calling partner should be completely upfront and transparent about **all anticipated costs**. The takeaway is that there should be no surprises at the end of the program.

Unfortunately, with the more unscrupulous appointment-setting services, hidden fees are a key component of their business model.

So, when you ask them for the overall campaign cost and they provide a number, don't assume you have thoroughly covered this topic or have the *real number*.

Ask if the costs for specific campaign components are included.

For example: *who's providing the list? If it's the call center, what's the cost? What about list hygiene – is that included? Are there fees associated with creating and optimizing the call script? If you require special reports in a unique format – is there an extra fee for these reports? Will you be charged for the call recordings?*

A word of caution about hidden costs:

As you go down the path of **what is** and **what is not included**, and your potential appointment-setting partner is not forthcoming, then it is likely they will not be forthcoming on other issues related to your project, *i.e., results, caller experience, industry experience, and so on*. Just something to prepare for and keep in mind right from the beginning.



Now you're ready!

Armed with these 5 essential questions, you are now in a great position to speak with appointment-setting firms to determine which one is right for your company.

As you go through your vetting process, we recommend that you create a spreadsheet with your *prospective firms* in the left-hand column and these **5 key questions** across the top. As these companies answer your questions, fill in the matrix. At the end of this exercise, it will be clear which appointment-setting firm is the perfect fit for you.

To learn how Appointment Setting Pros can help you achieve your sales goals, contact **Kristina Beaulieu**, a veteran of appointment-setting campaigns with more than 20 years' experience and a thought leader in the space.

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