

Who should be making those Appointment Making Calls?

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Companies that depend on setting appointments with new potential customers over the telephone often outsource the critical “setting of Initial Appointments” piece of their sales cycle. While this decision takes direct control of their success out of their hands, they believe the alternative is riskier.

While it is difficult to tell the boss we’ve missed our revenue goals because “the outsourcer did not set enough appointments;” it is equally, or more difficult to tell the boss that the sales force did not set enough appointments. For many companies using outsourcers, the decision was a collective ‘whistle past the graveyard’ because no one in the decision process has ever figured out how to make the sales force option viable. In other words, management is sympathetic to the problem and buys into the group think that this is an intractable problem. (Note: this also holds true for companies that tried to create an inside group to set appointments.)

Outsourcers have value in many sales environments. That value should reflect that the outsourcer can better ‘execute’ a well designed program; not just because our own sales team would not, or could not execute the needed program.

Let’s take a look at the three reasons sales management gives for using outsourcers to set Initial Appointments. The three reasons are:

1. The sales reps **would not do it**. They simply refuse to telephone prospect. In many cases, they make a half-hearted effort; in some cases falsify reports; and in other cases the issue is so emotional that a sales force will let it be known they will quit if leaned on.
2. The sales rep **could not do it**. They would like to, they see the need, but despite the time and effort, they still fail. In some cases, this is despite management’s best attempt to help them succeed. This is not a failure of will as much as a failure of process.
3. The sales rep **should not do it**. There are valid cases for this position. However, most proclamations from sales reps that they should not are actually from reps in the first two categories. The valid



case is typically made for field reps whose goals involve high ticket items, long sales cycle, complex sales issues and multiple recommenders. That said, there still are a small group of very high-end targets that the sales rep should pursue themselves. The sales rep is generally the only one skilled enough to handle the nuances of a discussion with a high-end target and set an appointment. There are also situations such as follow-up calls from earlier conversations with the sales rep that are virtually impossible for an appointment setter to handle, so even in these situations, the reps should have the skill set.

In conclusion, no matter which avenue we take to setting the all important Initial Appointment, our sales rep must still own the responsibility for their assigned quota. Outsourcing the first step does not abdicate the responsibility for having enough Initial Appointments to hit the assigned target. That means that reps must know how to perform this critical task and have a process and a set of tools to make them as effective and efficient as possible.

Managers need to create, own and control - the right combination of Art, Best Practices and Science to search for new customers. Once that is accomplished, then decide on the best person to make the calls – field sales, inside caller, outsourcer, or a combination of all three. 'Would not, could not, should not' should be irrelevant.

Caponi Performance Group, Inc., along with Contact Science, provides a holistic solution to Appointment Making by providing a proven methodology that addresses both the effectiveness and efficiency of the process. Visit us at <http://www.coldcalling101.com> and at <http://www.caponipg.com>.

