

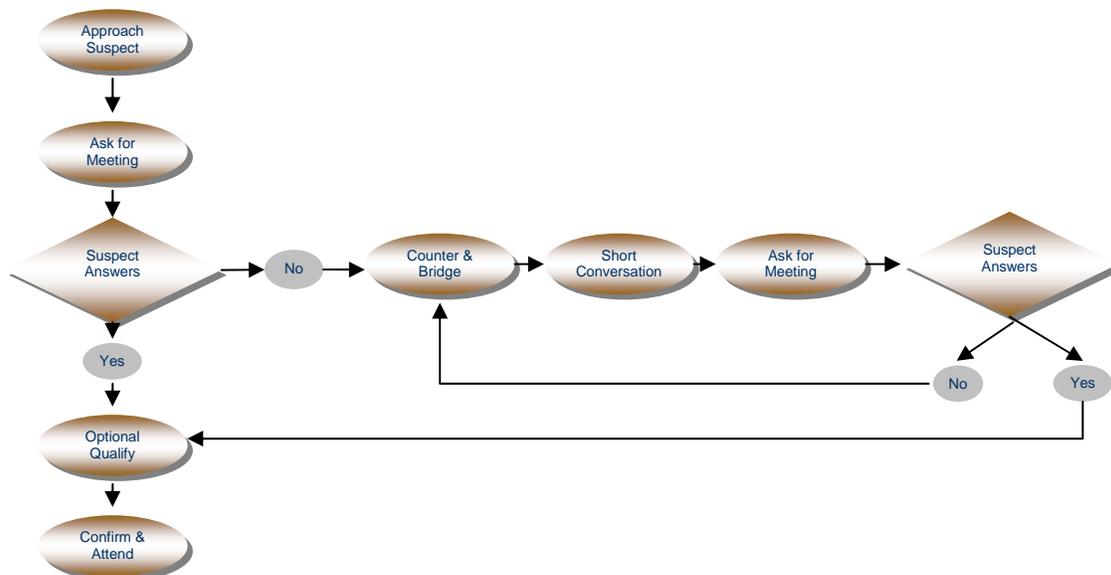
Mastering Sales Series

The Appointment Making Formula™

Five Session Web Based 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 be 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.



Flow Chart of *The Appointment Making Formula™*

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.

This five session workshop is a slightly condensed version of our standard day-and-a-half workshop that has been successfully implemented by large organizations for years. It is delivered either with, or without, the optional implementation of the Klpz based solution which addresses the efficiency challenge in the process (see below). It consists of five separate ninety minute sessions and it is designed for smaller sales forces, geographically dispersed sales forces, or individual sales people. It will enable you to utilize our proven methods for overcoming call reluctance in cold calling, capitalizing upon referrals, and securing more appointments with decision makers. Using **The Formula's** easy to use templates, Sales Representatives will create their own individual approach for qualifying and appointment setting and build key skills necessary to generate new appointments.

The only differences between this format and the full day-and-a-half format are reduced role playing, the removal of lead and referral generation discussions, and no live call blitz. Follow-through services to reinforce the methodology and develop personalized Best Practices are optionally available in this program.

The actual workshop is a live, instructor led workshop delivered over the web via GoToWebinar.com on five separate days; generally over a five week period. Homework exercises are assigned after each session.

To address the efficiency challenge (Science), we strongly recommend the incorporation of an automated tool called Klpz to help in the process, although it is not required for this workshop. 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.



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 the KPIs
 - The benefits of using scripts
 - The benefit of controlling the flow of the conversation
 - 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 into a short conversation
 - Focus on attaining the appointment

5. **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 (optional)



6. **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 the understanding, design and management of calling campaigns
 - Process Flow Chart
 - Conditioned Response Handling Flow Chart
 - 'Fill in the blank' template to develop a customized call process

7. **Optional Post Workshop Follow-through**

- Scheduled telephone conference call follow-through sessions to:
 - Track success (KPIs) – review of actual Klpz call block reports to isolate specific areas for improvement
 - Trouble shooting
 - Role playing

