

Appointment Setting: An Introduction, Not a Lifetime Commitment

by Wendy Weiss

No matter how one initially finds a lead, whether from a referral, a networking event or simply a cold list, at some point you must pick up the telephone and speak with that prospect. If that initial telephone conversation does not go well, you will not move to the next step in your sales cycle.

Every sale has a cycle. Step one is always the introduction. Step two is “getting in the door.”

I’ve never cared for the term “cold call”—it sounds scary. I prefer “introductory call.” Your call is to introduce yourself, your company and your products or services. This is simply an introduction that takes place over the telephone. The concept includes cold calls, warm calls and referral calls.

Most commonly, people use introductory calling to set new business appointments with prospects. They use the telephone to “get in the door” and be able to sit down face-to-face with a prospect and have a selling conversation.

In order to effectively set new business appointments, it is important to determine the goal of your initial telephone call. The goal of your initial call may actually differ from your ultimate goal. Many of you would say that your goal is to close the sale. And that is true—closing is your ultimate goal. Closing, however, is not usually the goal of your first telephone call. This is an important distinction. If you want a face-to-face meeting with a prospect then your goal on that first call is to set the appointment and only to set the appointment.

On that introductory call, you are not selling whatever you are selling, you are selling a meeting. You want your prospect to give you 10 to 15 minutes, so that you can introduce yourself, your company and your product or services. And that is it. At this point, you are not asking the prospect to do anything but give you time. You are not asking her to buy anything, change vendors, commit to or change anything that she normally does.

Approaching your calls this way changes the entire conversation. Suppose your prospect tells you that she already has a vendor. It doesn’t matter. You are not asking her to change vendors, you are asking her to meet with you so that you can introduce yourself, your company and your product or services, and that way, in the future, if her situation changes, she’ll know you. Certainly, it never hurts to have a backup source. This is entirely reasonable and is an effective response to the standard prospect objection; “I have a vendor.” (By the way, if your prospect already has a vendor, that makes her a qualified prospect—she buys what you are selling.)

It is frequently difficult to have a comprehensive selling conversation with a prospect on the telephone. That is why the face-to-face meeting is so vital. That meeting is your opportunity to assess need, look for opportunity, continue to build rapport and ask for the commitment to the next step in your sales cycle. Your goal on the telephone is scheduling the meeting and only scheduling the meeting. The fact that your prospect has a vendor (or several vendors) is totally irrelevant to your goal. (If your prospect tells you she has no vendors, you either just got incredibly lucky—or more realistically, she probably buys very little of what you are selling.)

If you think about introductory calling in this manner, the entire tenor of your conversation with your prospect changes. There is less pressure, both on you and on your prospect. It makes your manner more relaxed, and it relaxes your prospect and allows them be open to what you are saying. This works. Once you are in the door, the sales cycle can move forward.

The biggest and most pervasive mistake in introductory calling is not asking for the meeting. Last year I had a coaching client who called me in desperation. He said, "Wendy, I don't know what to do. I have spent hundreds of hours making calls. I have dialed the telephone hundreds of thousands of times. I do not have a single new business appointment to show for all that work! I've reached the end of my rope."

In our coaching session we reviewed his approach. I took him word by word through his introduction and how he would handle those prospecting conversations. It turns out that my client never, ever asked for the meeting. And my client never, ever got the meeting. Once, however, he started asking for those meetings, one out of every two or three phone calls resulted in an appointment.

In the interest of encouraging all my readers to ask for the meeting I offer the "Appointment Setting Mantra:"

"I'd like to introduce myself and (your company name goes here) personally. I need 10 to 15 minutes, whenever is good for you. Can we carve out a few minutes next week or is the week after better?"

Note: It is important to offer choices of time. It changes the conversation from if your prospect will meet with you to when your prospect will meet with you.

The lessons here are basic. Know your goal. The appointment. Focus on your goal. The appointment. Ask for what you want. The appointment.

Approach your prospect with a manner that says this is an introduction--not a lifetime commitment.

Go forth and prospect!

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