Appointment Setting Training

Presenter

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Training Agenda

- Appointment Setting Preparation
- Appointment Call
- Role Play
- Q & A
STEP 1
Appointment Setting Preparation

- Be familiar with the contacts & their businesses
  - Who are the contacts?
  - What industries do they represent?
  - When are good times to make contact?
  - Are there enough contacts to set at least 20 appts? (about 200 contacts represent about 20 appts)
Appointment Setting Preparation

• Who are the most knowledgeable callers in the various industries represented in your call team?
  • For example, callers who have knowledge of the insurance industry would be best suited to contact insurance agents, etc.
  • If all industries are not represented from the callers
    • Solicit additional callers,
    • Interview Kiwanians who are
    • Simply wing it☺
When is the best time to make calls?

- For example, if you are calling on banks, calling at 8am may not be productive. (many banks don’t open until 9am—research your contacts)
- Restaurants should NEVER be called during their busy hours (lunch & dinner, depending on the restaurant)
STEP 2
Appointment Setting
Script

Established Club Script:

New Club Script:

• **Before you dial:**
  • Review the script BUT make it your own
  • Find a quiet place to make calls
  • Have a note pad & pen available for note taking
  • SMILE
  • Dial
Appointment Setting Training

Questions?