Getting the Appointment

Do you spend too much time chasing elusive prospects? Follow these proven steps to spend less time getting the appointment and more time face-to-face with your customer.

1 Research the Prospect
The first step toward a productive meeting is to research the company and the decision maker. Make sure your product or service will benefit the prospect.

2 Establish Credibility
Begin the relationship by introducing yourself and your company to the prospect through a personalized mailing.

3 Choose a Path
If you have a past customer who has ties to the prospect, a direct referral could be your shortcut to the prospect. If not, proceed through the gatekeeper.

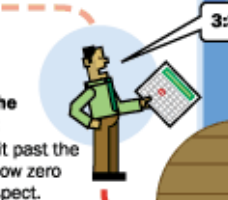
5 Talk Benefits, Not Features
Tell the gatekeeper how your product or service can benefit the decision maker and the company. Be sure to make information relevant and specific, to show you have the company's best interest in mind.

4 Tap into the Gatekeeper's Brain
Gain inside knowledge about the company and its organization while winning the gatekeeper as an ally.

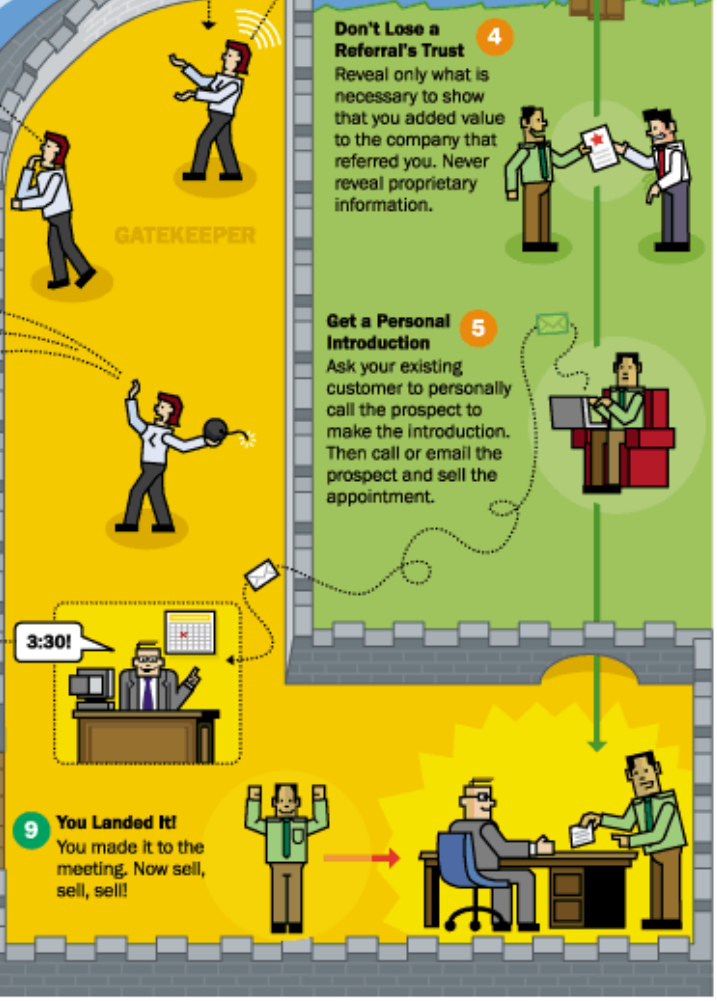
(Direct Referral)

6 Work on Contingencies
Make it clear you need to talk with your prospect in order for anything beneficial to happen.

7 Anticipate Obstacles
Prepare responses for standard obstacles. When the gatekeeper says, "He's on the phone," ask when the prospect will be available. Obstacles can pop up on the phone or in person. Sell the appointment via email if needed, or call after hours, when the gatekeeper is gone. Don't give up.



8 Always Sell the Appointment
You've made it past the gatekeeper, now zero in on the prospect. Focus on getting the appointment and save selling the product for the meeting.



4 Don't Lose a Referral's Trust
Reveal only what is necessary to show that you added value to the company that referred you. Never reveal proprietary information.

5 Get a Personal Introduction
Ask your existing customer to personally call the prospect to make the introduction. Then call or email the prospect and sell the appointment.

9 You Landed It!
You made it to the meeting. Now sell, sell, sell!