

APPOINTMENT SETTING

**The Do's and Don'ts of
Proper Appointment Setting**

OVERVIEW

- Having preset appointments can definitely increase your production. However, like everything else, there is a right and a wrong way to set appointments.
- Many of the most successful agents in this industry DO NOT use preset appointments, they Door Knock! However, some do a combination of both Appointments and Door Knocking. Door Knocking in between those appointments is very effective.
- It takes a very different set of skills to book appointments on the phone vs. selling final expense face to face. Just because you are good at selling face to face does not mean you will have the same success booking appointments over the phone.

UPSIDE TO HAVING PRESET APPOINTMENTS

- Preset appointments will help insure that all applicable parties (both husband and spouse) will be there.
- The prospect is ready and is expecting you and knows what the appointment is about.
- Gives some structure to your week. People are expecting you.
- Increases the chance that the prospect will be home. However, an appointment does NOT guarantee that the prospect will be home.

DOWNSIDE TO HAVING PRESET APPOINTMENTS

- It is easier for someone to tell you that they are “Not Interested” over the phone. It’s much easier for you to overcome objections face to face when Door Knocking. Plus, they can see you and the card that they filled out.
- Having a lot of “No Show” appointments can be demoralizing. Also, waiting for appointments can take time. Example: If it’s 12:15_{pm} and you have a 1:00_{pm} appointment....you don’t have enough time to Door Knock because if you get in a home, you could be significantly late for your 1:00_{pm} appointment. This means you now have to sit in your car till 1:00_{pm}. Many agents will take this opportunity to make calls to book more appointments.
- Setting appointments will require extra time and effort. The best time to call for appointments is on the weekends and evenings.
- Some people will just simply not answer the phone. This is very common in the senior market especially if they do not recognize the number on caller ID.
- Let’s face it, not all leads will have phone numbers. You can go to www.whitepages.com to try to find it but not all will be there.

PROPER APPOINTMENT SETTING

- Make sure to keep the Telephone Script in front of you when calling. (can be found under printable forms)
- **Keep a soft and steady voice**....Do Not “TRY” too hard. You will sound like a telemarketer.
- **Never** give any information over the phone specific to a policy or cost. Your goal is to Book an Appointment!!
- **Never Never Never** Pre Qualify a client. You will have access to products to fit the needs of every client. It does not matter what their health status is....**Just Book The Appointment.** Many people have policies that we can replace, such as a term policy. You have to be in front of them to do a proper evaluation and presentation.
- Do Not book appointments more than **48 hours out**. Once you go past 48 hours, your “No Show” ratio will double.
- Make sure they **write the appointment date and time** on a piece of paper before you hang up. Writing it down will help them remember the appointment.
- Make sure they understand that both **husband and wife must be there**. Giving an appointment without the decision maker is a waste of time.

SCHEDULE FOR SETTING APPOINTMENTS

- Saturday morning from 9:00am to 11:30am. The later in the day it gets...the greater the chance they have left the home. Saturday appointments should only be booked for Monday or Tuesday.
- Sunday evening from 5:00pm to 7:00pm. Sunday appointments should only be booked for Monday, Tuesday and Wednesday.
- Weekdays during 4:00pm to 8:00pm

IS APPOINTMENT SETTING A GOOD IDEA FOR YOU?

- Think about how the prospect hears you. Do you have an accent? Are you hard to understand? Is English your second language? Do you have a good telephone voice? All of these are important. You will have one shot to book an appointment. Think twice about setting appointments with seniors if any of these apply to you.
- If you don't book the appointment...still Door Knock the lead. **Never Never throw a lead away until you are 100% sure its dead. The only way to truly determine that, is to meet with the client.**