APPOINTMENT SETTING GETTING STARTED CHECKLIST

The most successful Appointment Setting engagements are set up for success right from the start. This checklist highlights the activities that need to happen before launch, as well as some factors to maximize the ongoing success of the program.

PRE-LAUNCH ACTIVITIES

1 COMPLETE THE VALUE POSITIONING WORKSHEET

The Value Positioning Worksheet, which you'll receive from your BAO Client Relationship Executive (CRE), includes key information about your solution, including the pains and challenges it solves, benefits, competitive differentiation, etc. Each BAO Inside Sales Representative (ISR) assigned to your campaign will be provided a "Client Messaging Guide" for reference when prospecting. Your answers to this questionnaire will form the foundation of that guide.

2 HAVE EACH REP WE'LL BE SUPPORTING COMPLETE THE SALES REP PROFILE

This profile, which is included in the sales rep welcome package you'll get from your BAO CRE, documents basic info and preferences for each sales rep working with BAO to help our ISRs better support your sales reps.

3 ESTABLISH YOUR TARGET ACCOUNT LIST

You have two options: you can provide us with a list of companies, or we can build a list for you based on your criteria. If you wish to provide the list to us, please see the **Target Account List template** which includes the fields we require. If you prefer to have BAO build the list, please provide us with the key targeting criteria (see **Target List Creation: An Overview of Market Segments** for details).

4 THINK ABOUT THE PERSONAS YOU WOULD LIKE TO TARGET

In addition to defining a list of companies to target, we'll also need to know which contacts you'd like us to target. Think about the lines of business (LOB) as well as the functional areas within those lines to target. It's also helpful to think about the titles for your ideal audience, including their roles and responsibilities.

5 SET UP YOUR CRM INTEGRATION

We can upload BAO-secured meetings into Salesforce or any other CRM or marketing automation solution. The process is straightforward but does require coordination with your organization's Salesforce admin or sales operations contact. Details are available in **How to Integrate Your BAO Appointment Setting Program into Salesforce.com.**

6 SET UP CALENDARING AND EMAIL

When an appointment is secured, the BAO ISRs assigned to your campaign will send a calendar invitation directly to the prospect and your sales rep in real time. As a best practice, we suggest having all participating sales reps provide BAOs ISRs with read-only access to calendars for scheduling purposes.

OPTION 1

CLIENT-PROVIDED EMAIL

If your company has elected to opt into this calendaring option, we will provide you with the BAO ISRs' email addresses.

BAO ISRs will need email set up along with visibility into the calendars for all participating sales reps. The ISR emails must be in place before they can begin dialing.

OPTION 2

BAO SCHEDULING ASSISTANT EMAIL

If your company selected the BAO scheduling assistant email option, the BAO ISRs will be set up with the following email alias:

ISR_NAME.CLIENT_NAME@SCHEDULING-ASSISTANT.COM

Your sales reps will be asked to share read-only calendar access with the scheduling assistant alias. ISRs calendar access must be in place before they can begin dialing.

TIP

START THINKING ABOUT HOW YOU'LL TRACK YOUR INVESTMENT

Determine how you will measure the success of the program and establish the necessary KPIs and the process to evaluate progress toward your goals.

BAO

ONGOING SUCCESS FACTORS

1 ENSURE THAT ROI TRACKER™ SURVEYS ARE FILLED OUT FOR EVERY APPOINTMENT WITHIN FIVE DAYS

The BAO ROI Tracker™ is a simple tool we use to measure quality so we can regularly adjust our outreach to further boost results. By completing an ROI Tracker for every appointment, you're providing us with the feedback we need to ensure that the appointments we secure meet and exceed your expectations.

2 CREATE A SALESFORCE CAMPAIGN TO TRACK RESULTS

You should create a Salesforce campaign, for example "BAO Meetings Public Sector 2021," so you can easily monitor program outcomes. When meetings are pushed into the CRM via the integration discussed above, we can have them automatically become members of that campaign.

3 MAINTAIN GOOD SALESFORCE LEAD AND CONTACT HYGIENE

Ensure that your sales reps continue to update the lead/contact records in the CRM for all their BAO-set meetings. Keeping the call and activity details up to date enables attribution so you can understand the pipeline impact and ROI of your program.

TIP

INSTILL BEST PRACTICES ACROSS YOUR TEAM

Check out **Best Practices for Sustained Appointment Setting Success** that are proven to boost the results of your campaign.