BEST PRACTICES FOR SUSTAINED APPOINTMENT SETTING SUCCESS

BAO has been setting appointments for high-tech companies since 1997, and we've learned a thing or two along the way.

Here are some tips and best practices that we've gleaned from our most successful clients over the last twenty plus years to help you maximize the success of your appointment setting program.

1 COLLABORATE, COLLABORATE, COLLABORATE.

While it may seem like simple thing, no matter how your specific appointment setting program is structured, the number one key to success is collaboration.

ESTABLISH A TIGHT PARTNERSHIP WITH BAO.

Having full organizational buy in is a must, and open lines of communication go a long way. Weekly or bi-weekly syncs between your leadership and your BAO account manager will be scheduled. You should use these meetings to share feedback about what is and is not working so we can make any necessary adjustments to keep the program performing at a high level.

It's important for us to hear that candid, detailed feedback—the more input you provide, the better results BAO will be able to deliver. Tell us how things are going, and also communicate how we can strategically work on your behalf to make the most impact.

PLAN FOR REGULAR, FREQUENT COMMUNICATION BETWEEN REPS AND ISRS.

The most successful appointment setting programs are those where the client's sales reps actively engage with their ISRs. Establishing a personal relationship and then staying in constant contact will ensure alignment, keep the program on track, and ultimately lead to better results.

One successful rep/ISR team shares the secrets to their collaboration, which resulted in almost $700K in pipeline.

Learn more

Your sales reps should connect often with their BAO ISR to develop a strategy for their territory and provide/request feedback. They should work together as a team to review priority accounts, discuss upcoming schedule availability, develop strategies for breaking into specific accounts, etc.

Even just a 15-minute weekly call can be effective. Close teamwork will maximize productivity and ensure our ISRs are continuously making an impact.

2 PROVIDE IMPACTFUL INFORMATION ABOUT YOUR SOLUTION(S).

GIVE US CUSTOMER-CENTRIC, RATHER THAN PRODUCT-CENTRIC, MESSAGING.

Providing BAO with materials and messaging from the perspective of the audiences and personas the ISRs are calling will help them quickly articulate a value proposition that will resonate—and lead to better meetings with the right contacts. When BAO ISRs connect with prospects, it's human nature for the person on the other end of the line to wonder, "what's in it for me?" Messaging and materials geared toward the persona's role and day-to-day duties can help us home in on those key points.

PROVIDE SEGMENT-SPECIFIC MESSAGING WHEN POSSIBLE.

The more our ISRs can break down the message by industry or other key segment, the more targeted they can get in their conversations with prospects to secure the appointment.

3 TRACK AND SHARE RESULTS.

In order to understand the success of the program, you need visibility into the quality and viability of each opportunity, and you need to be able to measure pipeline generated by the program in both early and late stages of the sales cycle. This type of visibility requires cooperation and buy in across various levels of your organization, from sales reps on the front lines all the way through to marketing, sales operations, and sales leadership.

PROVIDE FEEDBACK ON MEETING QUALITY.

The **BAO ROI Tracker™** is our post-meeting survey tool that is used to capture early-stage feedback associated with each meeting so we can monitor quality compared to KPIs. One hour after the scheduled start time of each appointment, the sales rep for whom the meeting was scheduled receives an email that asks five questions about the meeting. The BAO ROI Tracker also asks the rep to rate the appointment on a scale of 1 to 5.

It's designed to be simple and fast so it's an easy routine for your reps to get into, but it's a critical step to help ensure that every appointment meets your expectations.

As the feedback loop built into the BAO process, the ROI Tracker allows us to refine and improve the program in real time as input comes in.

INTEGRATE APPOINTMENTS WITH YOUR CRM.

BAO offers the option to upload secured appointments as leads into your organization's Salesforce.com (SFDC) instance. This enables you to automate the capture of appointment details to avoid manual data entry. We can also provide attribution by using SFDC campaigns.

With up-to-date records in your CRM system, you can track the ROI of appointments as those contacts move through the sales cycle. This gives you meaningful data to evaluate your investment. Additionally, by seeing which initial meetings move into second sales activities, create pipeline, and ultimately become closed deals, you can get insights for potential areas to optimize the program.

4 SUPPORT ONGOING ENABLEMENT.

We're all operating in a dynamic environment: new reps come on board, messaging evolves, your targets shift. Your program needs to remain fresh so it can continue to perform well. Consistent updates in these areas will help BAO create impactful at-bats for your sales team.

KEEP MESSAGING AND POSITIONING UP TO DATE.

The better armed our ISRs are with the most current information—whether that's product messaging, the competitive landscape, recent company awards or achievements, new customer wins, etc.—the better they're positioned to secure high-quality appointments with the right contacts. And, since they often act as the introduction to your company, it helps them be the best possible ambassador for your brand.

WHEN IT COMES TO TARGET LISTS, BIGGER IS BETTER—AND REFRESH REGULARLY.

Appointment setting is a numbers game just like other stages of the sales pipeline. You need marketing to deliver more MQLs than you expect to turn into SQLs, and you need more SQLs than you expect to turn into qualified opportunities. Likewise, your appointment setting program needs an ample list of target accounts to work from.

The larger the initial list we have, the more high-quality appointments your sales reps will get. The criteria we use to set the appointments doesn't change with list size—and don't forget that BAO is on a pay-for-performance model—so there's only upside in providing the largest lists possible. And be sure to keep them updated, adding new targets on an ongoing basis, to keep production consistent.

Check out our Target List Creation guide, which provides an overview of market segments in North America. It's a great resource to collaborate with your BAO client relationship executive on in order to find some net new segments of prospects to target.

CONSIDER HOLDING MONTHLY ENABLEMENT SESSIONS.

It can sometimes be the case that when new sales reps are added to the BAO program after the initial kickoff, they don't get the same level of training that the full team received at program launch. Your BAO client relationship executive can run regular sessions to ensure new reps are armed for success and allow tenured reps to optionally attend in case they need or want a refresher.

HOLD REPS ACCOUNTABLE.

BAO ISRs take on the heavy lifting of cold calling and setting appointments for their assigned reps, but the more engaged those reps are in the process, the higher-quality results they'll get over the course of the program. Ensure that every rep in the program regularly meets with their ISR, updates the lead records in your CRM for the appointments set, and submits an ROI Tracker response for every meeting.

BY FOLLOWING THESE BEST PRACTICES, YOU'LL SET YOUR APPOINTMENT SETTING PROGRAM—AND YOUR SALES PIPELINE—UP FOR MAXIMUM SUCCESS.

We're here for you every step of the way. If you have any questions or feedback on your program, contact your BAO account manager.

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