

BAO

BAO ROI TRACKER™

The BAO ROI Tracker™ is our post-meeting survey tool that is used to capture early-stage feedback associated with each meeting secured via your appointment setting engagement so we can monitor quality compared to KPIs.

It's designed to be simple and fast so it's an easy routine for sales reps to get into, but it's a critical step to help ensure that every appointment meets expectations. As the feedback loop built into the BAO process, the ROI Tracker allows us to refine and improve each appointment setting program in real time as input comes in.

1. DID THE APPOINTMENT OCCUR?

2. WAS IT WITH THE APPROPRIATE PERSON?

3. DID YOU GET A REFERRAL?

4. PLEASE DESCRIBE THE OPPORTUNITY

5. IS THERE A SCHEDULED SECOND SALES ACTIVITY?

6. RATE THE APPOINTMENT
5 = great, 1 = poor

POTENTIAL WITH NEXT STEPS

The appointment achieved some interest from the contact and immediate follow up activity to continue sales dialogue around your solution.

VIABLE LONG-TERM PROSPECT

The first appointment achieved good dialogue, but due to their existing circumstances (contract, budgetary situation, etc.), a follow up will take place in 6-12 months.

NOT A VIABLE PROSPECT

After discovery, there is not a near or long-term opportunity with this organization for your products or solutions.

HERE'S HOW IT WORKS

One hour after the scheduled start time of each BAO secured appointment, you will receive an email from ROI_Tracker@baoinc.com that requires a response within five business days and includes the following questions:

POTENTIAL AND NEEDS MORE DISCOVERY

The appointment achieved some interest to continue sales dialogue, but the environmental or budgetary requirements still need more vetting.

VIABILITY UNKNOWN

The first appointment achieved discovery and education, but more research will be needed on the account or influencers who would be involved in the sales process.

BAO