

CLIENTELING



APPOINTMENT SETTING

Appointment setting involves the strategic scheduling of meetings or interactions with potential clients, ensuring a focused and personalized approach to discuss products or services, ultimately optimizing the sales process.

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How to use Weekly Meeting Topic Guides

What are the Weekly Meeting Topic guides?: One-page topic guides to help managers educate their sales team on sales growth topics and strategies.

Goal: BSPK morning meetings are designed for one simple purpose:
to modify behaviors in order to achieve a desired result.

Weekly Topic: The meeting is intended to be delivered daily for an entire week in order to ensure that all team members have fully absorbed the content before moving on to the next topic.

Sections: BSPK morning meetings are divided into 4 easy steps.

- Introduction
- Questions for the team
- Teach the topic
- Set the expectation

Meeting time: A morning meeting should be no longer than 15-20 minutes.

Best practices:

- Review the content before your morning meeting
- Deliver the meeting in your own voice without reading verbatim from the meeting notes
- Use the guide as a reference but always make eye contact with your team
- After the meeting, be present on the sales floor and be prepared to provide in-the-moment coaching where needed

How to Schedule Appointments

Step 1 Introduction

Good morning, team. Today we are going to discuss how to effectively set appointments with clients. Appointments can provide a more elevated shopping experience, leading to increased loyalty and spending. Appointment setting is a skill that takes practice, but once you have learned it, you will see the difference in your sales performance.

Step 2 Questions for the team

- What are your biggest challenges today when you try to schedule appointments?
- How do you describe the value to your client of setting an appointment with you?

Step 3 Teach the topic

Let's discuss some best practices to schedule appointments and how to get a commitment from your clients to show up.

Relationships matter: Having a good relationship with your clients is a great starting point when setting appointments. When clients trust you and value your assistance, they will be far more likely to schedule an appointment.

Explain the value: No wait times, uninterrupted attention and personalized recommendations set aside for the client for their visit. If you want to make the appointment extra special, consider serving the client's favorite drink or snack. You may also consider providing a coloring book or toys for small children, with their parents' consent.

Be specific: When offering an appointment, be specific with DAYS and TIME SLOTS. Give your clients some options to choose from but not too many options. Scarcity signals to clients that your services are highly sought after, further enhancing their perception of the value you provide.

Follow-up: Following up with clients the day before and the morning of the appointment serves as a gentle reminder and confirmation of the scheduled visit. It also demonstrates your commitment to their appointment and ensures that clients are more likely to keep their scheduled time. Clients often have busy lives and these reminders help to prevent no-shows or last-minute cancellations.

Are there any questions?

Step 4 Set the expectation (this is how you can say it)

This week we are placing a renewed focus on setting appointments. I'd like for each of you to strive for three quality appointments this week that result in a sale. We will be discussing this topic all week so I'd like for you to be prepared to share your feedback about what worked to successfully secure your appointments. I look forward to hearing your success stories.