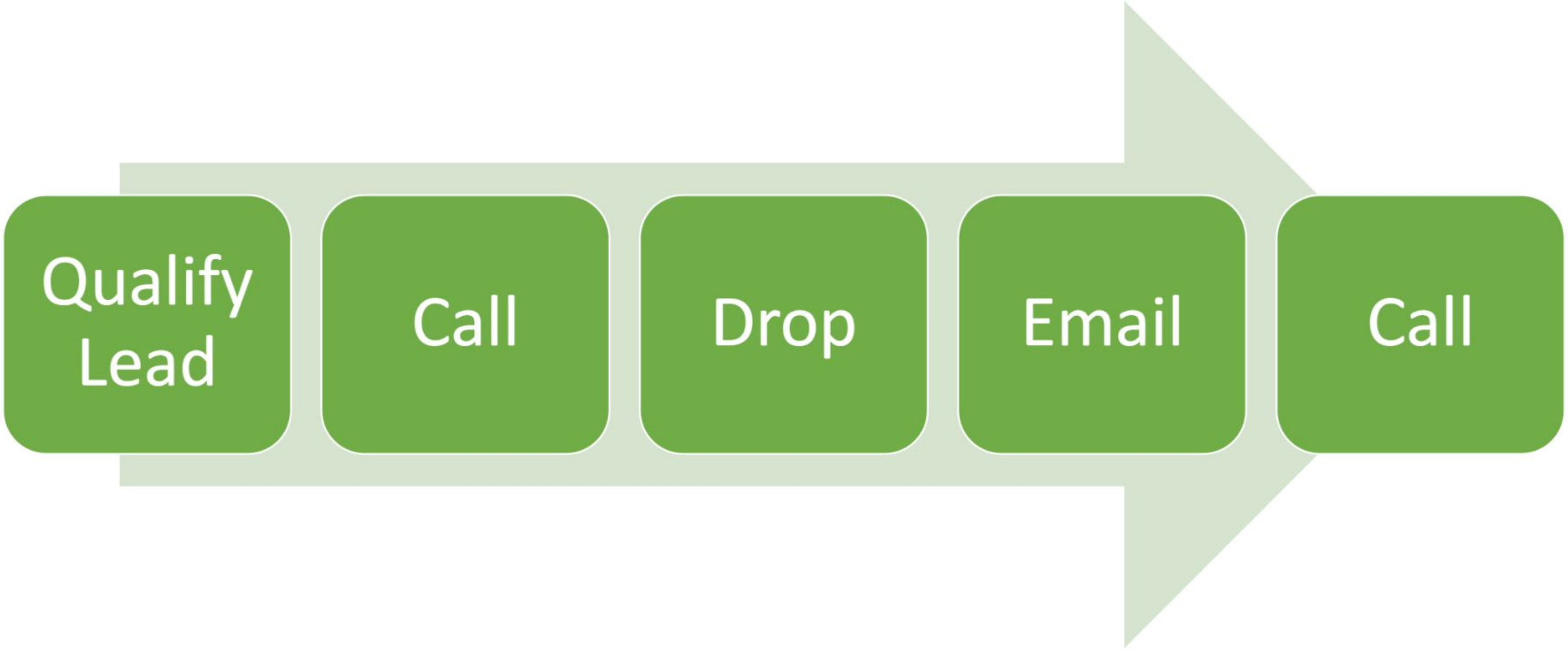
Setting Appointments and Overcoming Objections

Every call or drop is a sale!!

Either you sold the prospect with the idea to meet you, or they sold you with the reason they can’t meet you!

Prospecting – Weekly Flow



Steps to setting an appointment:

1. Qualifying the lead.

2. Calling or dropping intentionally with the decision makers information.

3. Scheduling an appointment.

Qualifying the lead

What information are we looking for ?
Why do we want to qualify the lead?

How to Schedule a Meeting:

Qualify the Lead:

- Verify address
- # of employees
- Who is in charge of benefits?
- Do they offer benefits?
- What do they like most about the benefits?
- Are they having any challenges with benefits?

Appointment Setting Call Script:

Hi my name is ___ and I’m a benefits consultant with Xperience Benefits. We help local businesses enhance their employee benefits by improving their service and education. Best part is, our services are available at no cost. Have you heard our name thrown around before? (wait for answer, they will likely say no) “We are the premier Employee Benefits Company in (state where you live). I have a couple quick questions…”

[Appointment Setting Call Script.pdf (wsimg.com)]

Schedule the Appointment

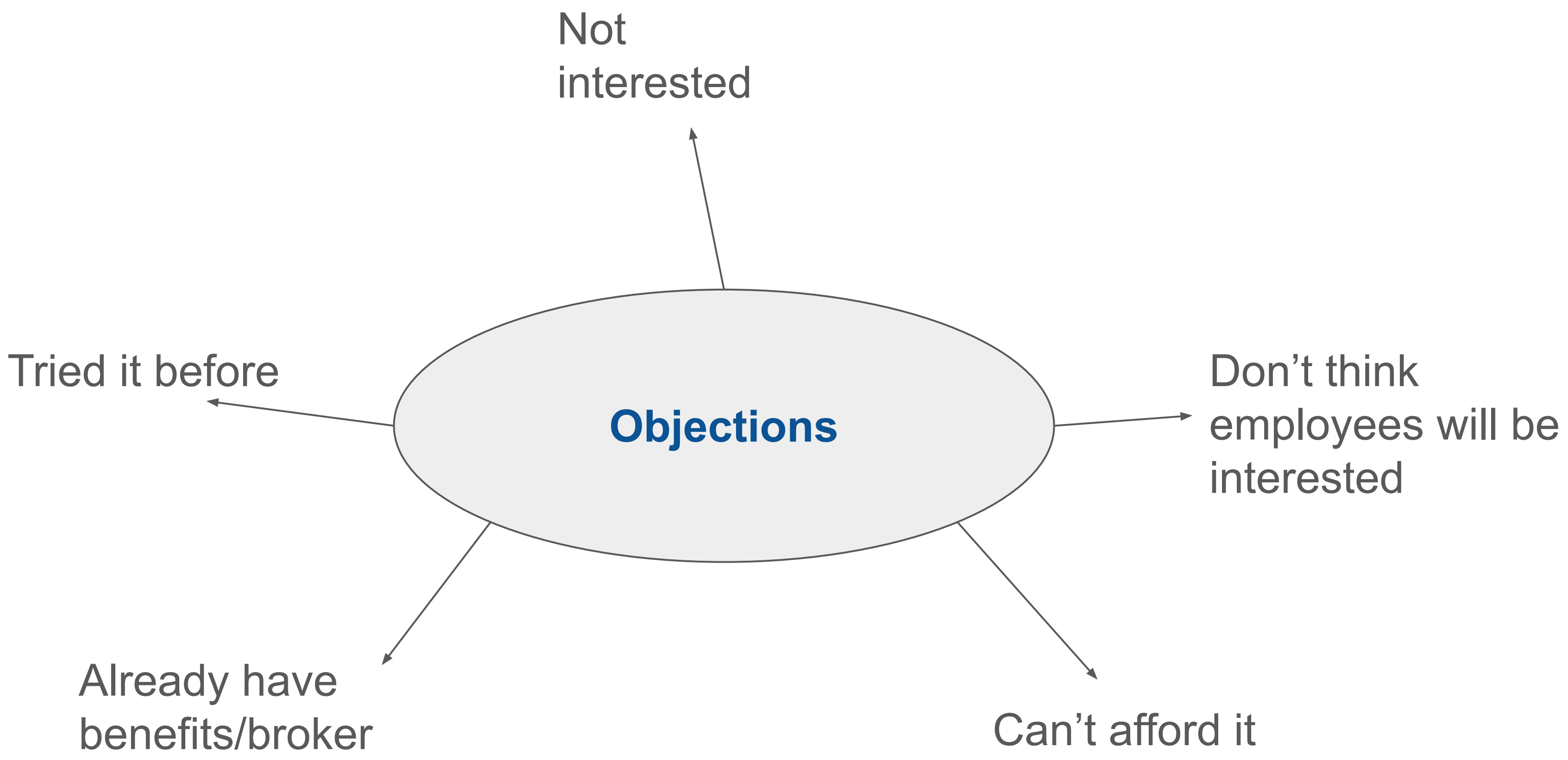
Start with **Why** - Your mission statement

Then **Who** - Who is in charge of benefits?

How? – this will be covered in the meeting

What? – we can’t make recommendations until we do a proper discovery

Schedule location first, then schedule the date and time


Not interested
Tried it before
Objections
Don't think employees will be interested
Already have benefits/broker
Can't afford it

The interesting thing about objections, is that the customer is not necessarily saying “no.” They are actually asking for more information because you have not completely satisfied their logical or emotional needs. Most of the time, objections fall within one or more of the following categories below.

Remember: The objections could fall within multiple categories

Money

Time

Need

Video Link here:

Urgency

Trust

The 3 A’s

1.) Agree
2.) Answer
3.) Ask

Example:

Client: “we are all set”

Agree: “I can totally understand”

Answer:“Most of my clients felt the same. We are not looking to change anything that works for your company”

Ask: “What do you you currently like most about your benefits package?”

Congratulations! you got the appointment !!!

What’s next ?

Schedule it on the Calendly link

How to Schedule using the Calendly link

- https://calendly.com/cynthia-benzohar
- Title of Calendar Invite
  - "Company Name - Employee Benefits"
- Select a date & time
- Name = Company name
- Email = Client’s email address
- Add guests
  - The agent’s email address
  - Bryn’s email address