JUST SET THE APPOINTMENT

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Success in the Insurance and Financial Industry is a direct result of making connections which engender sales. These sales come from Quality Leads and Effective Appointment Setting. This article touches on **the art and science of setting those appointments.**

Your number one focus when calling to set an appointment with a lead should be to *get it done within the first minute of talking with the prospect*. Do this by sounding casual and confident so the contact can be assured they will benefit by meeting with you.

If the person shows some **resistance**, do not react in a frustrated or combative way. Simply overcome the obstacle by calmly responding to their objection and immediately direct the conversation back to when and where you can meet. Keep in mind, some leads will always show more resistance than others.

For **those who still require more** of a reason to meet, you can highlight the advantages of speaking with you. You could emphasize: 1) The various options you have to fit their individual circumstances. 2) You will give them a comprehensive needs analysis which will help them understand their personal needs. 3) You can provide them with financial advice which will help them properly allocate their funds.

Again, don't say any more than you need to in order to reach your goal of setting an appointment. The more you say on the phone generally translates into less reason to meet as the prospect already has their questions answered. Probably the biggest mistake agents and financial advisors make is saying too much on the phone when trying to set an appointment. Rather, *prepare to say things which will heighten the person's interest in wanting to meet with you*.

If a prospect is still reluctant to agree to a meeting, you can explain that you can help them protect their family members in case of an untimely death or critical illness. You can mention you have some beneficial products which protect spouses and children. In addition, you can point out you have the ability to help them with retirement savings, estate planning and beneficial tax shelters.

It can be helpful to have a script prepared for your appointment setting calls, but **you must not sound scripted** – you should sound real and genuine. It is especially important for you to have specific responses prepared for a variety of objections which come up. This list of responses can be progressively expanded as you gain experience through the whole process.

In closing, stay upbeat, calm and confident. **Always expect an appointment on every call**. At the same time, you need to be realistic, knowing not every lead will result in an appointment. Remember not to dwell on tough calls or negative responses from some leads. To do so will derail positive possibilities on subsequent calls. We all have calls like these at times.

When you get in front of people you create a captive audience, which opens up untold possibilities. So, have a go-for-it, optimistic attitude. Then you will get those all-important meetings in which you can work your sales magic to reach your income goals.

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