

Mastering Inside Sales

Session 12: Appointment
Tracking

Your Coach(es)

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Please reach out if you have questions regarding the content of the course. If you have administrative questions about your client portal, billing or access, please reach out to fasttrack@kw.com or (512) 439-8684.

Guidelines:

1. Join MAPS on Facebook to stay up to date on all MAPS events and programs:
mapscoaching.com
2. Only paid participants may listen and contribute.
3. To ask a question you may type your questions into the “Questions” Box.
4. If you would like to speak on the call, click on the hand icon located on your dashboard and the coach will call on you when possible.
5. Complete all assignments prior to call.
6. Be PREPARED!

Notices:

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- evaluation of a Market Center's financial results;
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Telemarketing

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Objectives

1. Other than verbiage, how to achieve high show ratios
2. Appointment tracking essentials
3. Review of tracker

I. Setting Appointment Essentials

1. _____
2. Within _____ hours
3. Communication _____ set to seen
4. Remember, we are meeting to help you get (_____)
5. Nurse/Doctor or Waiter/Chef analogies, etc.

II. When Setting Appointments: Your Next Step Is...

1. Reasons:
 - a. _____.
 - b. Hot list for _____! No-shows were close to a yes
 - c. Lead rotation:
 - i. Round Robin
 - ii. Performance-based
 - iii. Best fit
 - d. Reveals _____ sources
 - e. Easily see monthly
 - f. Discover reasons didn't sign - _____

2. What to track:
 - a. Date set
 - b. _____
 - c. _____ or _____
 - d. _____ assigned
 - e. Source
 - f. Client _____
 - g. Client Street Address (if seller)
 - h. _____
 - i. Appointment _____
 - j. Show? Yes/No
 - k. Agency?
 - i. If no, reason
 - ii. If yes, _____
 - l. Anticipated _____
 - m. Anticipated _____
 - n. _____ Date
 - o. Final Price

Preparation for Next Week

1 MY AHA'S

2 ASSIGNMENTS

1. Discuss with leader appointment assignment (round robin, best fit, etc.)
2. Solidify what tracking system you will use (for appointments specifically)
3. Start (or continue) tracking today!