



MARKETING DIRECTIVE - CONFIDENTIAL

Instant Hat - Appointment Setting Checklist 2023 03 27

Consultants are to do the following actions in the established sequence. After each action is done with complete comprehension, check it off by initialing. It is vital and important to NOT go past anything that is less than 100% known.

Name

Date Started

___ 1. **STUDY:** Read and understand the Policy Letter “Selecting & Accepted Prospects”

___ 2. **STUDY:** Read, study and fully understand the Directive titled, “Spotlight Stories - Appointment Setting”

___ 3. **PRACTICAL:** Go to the following link and listen to the Appointment Setting presentation <https://www.localsearch4.com/trainingcalls>. You can listen to this as often as you feel you need to listen to it.

___ 4. **PRACTICAL:** Complete the form at <https://countyadvisoryboard.com/spotlight-input/> using made-up “Test” data. Search the CAB website to locate the stories you created and read them. Check out the punctuation for future stories.

___ 5. **PRACTICAL:** Read aloud and **loud** the entire pitch twice

___ 6 **PRACTICAL** Break down the pitch into smaller sections, including objection handlings, and read each section by itself 5 times loud and proud.

___ 7. **EXERCISE:** Drill (role play) with your trainer or another appointment setter the presentation until you are comfortable.

___ 8. **PRACTICAL:** Get a stat sheet and begin calling and doing Spotlight Interviews. lead lists and begin calling until you have set 3+ appointments on Day 1 or 7 appointments in a full day AND you feel confident that you can generate your own leads (1 per hour) at will whenever you desire to. Enter the prospects and their stories into the County Advisory Board website.



COMPANY POLICY – CONFIDENTIAL - 2023 October 30

SELECTING & ACCEPTED PROSPECTS

Do internet searches for the targeted cities and below business categories. Check for business with decent reviews that are not in the top 3 in the search.

Repair services

- Appliance repair services
- Auto Body, Repair, Glass & Tinting
- Carpenter
- Carpet cleaner
- Countertop services
- Electrician
- Fencing services
- Flooring repair, installation, new floors
- Foundations services
- Garage door services
- General contractor
- Gutter cleaning
- Handyman
- Home Builders, rehab and additions
- Home inspector
- Home security, theater services
- House cleaner
- HVAC services
- Junk removal services
- Landscaper
- Lawn care services
- Locksmith
- Moving services
- Pest control technician
- Plumber
- Pool cleaner
- Pool contractor
- Pressure Washing
- Roofers
- Sewage & drainage system services
- Siding services
- Snow removal services
- Tree services
- Water damage services
- Window cleaner & repair
- Window replacement, new windows

Learning services

- Beauty school
- Business training
- Dance instructor
- Driving schools
- Massage school
- Preschool
- Flight Schools

Business services

- Accountants
- Awards – trophies, medals, plaques
- Bookkeepers
- Financial & Estate Planners
- Flower Shops
- Lawyers – Business, Contract, Criminal, Disability, Estate, Family, Immigration, IP, Litigation, Malpractice, Personal injury, Tax Traffic, Bankruptcy
- Limousines, Air and Sea Charters, etc.
- Oil industry related services
- Printers, Screen Printing
- Real Estate Brokers, Commercial Real Estate
- Storage
- Tax specialist
- Transportation

Personal services

- Acupuncturist
- Allergist
- Childcare
- Chiropractor
- Clothing and Shoe Stores
- Dentist
- Dermatologist
- Doctor – primary care
- Dietitian
- Hair Salons, not barbers
- Furniture Stores
- Funeral Homes
- Hotels
- Massage
- Ophthalmologist
- Optometrist
- Orthodontist
- Pet Adoption. Boarding. Grooming, training
- Personal trainer
- Physical Therapist
- Podiatrist
- Nice Restaurants (steak, seafood, etc.)
- Tattoo
- Theaters, Venues, Bars & fun things to do
- Travel & Entertainment – Air, cruise, fishing
- Veterinarian
- Weight Loss Centers & Health Clubs
- Yoga studio



Appointment Setting Script

OPENING

Good(morning/afternoon). My name is _____ and I am calling on behalf of the County Advisory Board website.

We're reaching out because we are doing a FREE spotlight article on you and your business. I just need to speak with one of the owners for a brief phone interview.

Note: Repeat the opening to the owner if the person you were speaking with is not the owner.

INTERVIEW – Start asking questions and entering the data entry screen

- How long have you been open, or what year did you open the business?
- I Have the phone number as _____, and are you still at (address)?
- What is your Cell Phone number?
- What is a good email address to send a link of your story to?
- What is the correct spelling of your first and last name?
- Are there any other owners that we would include?
- How many employees do you have?
- When it comes to the community do you participate in any charities?

We do need to make sure you are qualified for this free spotlight article.

1.You are looking to expand your business.

2.You are willing to meet with our consultant and spend 15 minutes going over the services that Expansion Support Services has to grow your business.

SETTING THE APPOINTMENT - Immediately Start the Online Form

Now, you do get a chance to approve the story before it gets published. We do what they call a live edit, one of the consultants will come by to edit the story so we can get it published.

What is good time tomorrow when you can set aside 15-20 minutes for an edit?

It looks like they have a (10, 12, 2, 4) available. They will go over the story in its entirety, if you hear something you do not like, they can fully edit the story for you. Once you give them your



approval, they will get the story published and they will show you how the general public would access they story through a google search, and email you a link to the story.

Once done with the story, the consultant is going to tell you about Expansion Support Services, the company that owns and manages the County Advisory Board website, let you know what services we provide, and how we help companies in your industry get more customers.

Last question, you do want this Spotlight Story done on your business and you are willing to give our consultant that comes out 15 minutes to tell you about our company and how we help businesses get new customers, right?

QUESTIONS AND ANSWERS....

1. What is the County Advisory Board? It's a website that was created to promote positive stories about businesses and their owners.

We reach out to businesses and offer these FREE articles showcasing them and what they do in exchange for getting to introduce our company and services to local businesses.

We then post the articles to the County Advisory Board website. So basically, it's free advertising for you.

2. What's the catch? or Are you going to sell me something? After the Spotlight Story is done, we are going to introduce our company, and the services we provide. If you have a need for our services now or in the future, we hope that you consider using our services to assist you in your expansion.

3. What company are you with? I work for Expansion Support Services. We own and manage the County Advisory Board website.

4. How much does the story cost? We write, edit, publish the Spotlight Story and keep the article posted on the County Advisory Board for a year for free. We do want you to give us us 15 minutes of your time to introduce our company and services.

If you want to keep the free article posted after a year, we'll keep it online for \$20 per year which you can decide in a year.

5. (For a Phone Appointments) Do I need to be in front of a computer and do a screen sharing for the edit? Yes. The Consultant will do a screen share with you so that you can see the article and edits made in real time. This saves your time and ours as the appointment can then be done in one phone call.