



## SALES DIRECTIVE - CONFIDENTIAL

Revised September 21, 2024

### Instant Hat - Appointment Setting Checklist

Consultants are to do the following actions in the established sequence. After each action is done with complete comprehension, check it off by initialing.

\_\_\_\_\_

Name

\_\_\_\_\_

Date Started

\_\_\_ **1. CONDITIONAL - PRACTICAL:** When Appointment Setters gets prospects on the phone, listen to the Appointment Setters go through their Spotlight presentations. Listen to at least two Spotlight presentations. If no presentations are being done, continue with this training but stopping to listen when a prospect is on the hook.

\_\_\_ **2. STUDY:** Read and understand the Policy Letter “Business Categories to Target”

\_\_\_ **3. PRACTICAL:** Go to <https://countyadvisoryboard.com/> and review this website.

\_\_\_ **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 by searching the site by the artificial business. Read it.

\_\_\_ **5. STUDY:** Read, study and fully understand the Directive titled, “Spotlight Stories - Appointment Setting”

\_\_\_ **6. PRACTICAL:** Read aloud and **loud** the entire pitch twice from beginning to end. Now, break down the pitch into smaller sections, including objection handlings, and read each section by itself 3 times loud and proud.

\_\_\_ **8. EXERCISE:** Drill (role play) with your trainer or another appointment setter the presentation until you get through it 2 times. H

\_\_\_ **9. PRACTICAL:** Get a stat sheet, search out businesses outside of Florida that are on page 2 or lower of Google searches when searching by a city and service (Chattanooga Dentists). Begin calling and doing Spotlight Interviews until you have set 3+ appointments. Enter the prospects and their stories into the County Advisory Board website and update Highrise.



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## Business Categories to Target

When prospecting, some business categories are easiest to set appointments with, some easiest to close on CMAs and some best to close on becoming active customers. We do not service businesses that do harm, in our estimate, to society or people.

Here are three types of businesses with examples that we are most successful with:

**Recurring Revenue Services** – A few new customers covers our recurring fees.

- Swimming Pool Services
- Pest Control
- Landscaping, Lawncare
- Dentists

**High Ticket (\$500+) Services** – A few customers during the year covers our yearly fees.

- Auto Collision, Dent and Bumper Repair
- Tree and Stump Services
- Pool Builders
- Moving Companies – Independent
- Plumbing, HVAC, Electric
- Home Remodeling, Painters, Drywall
- Roofing – Commercial and Residential
- Semi-Truck & Engine Repair
- Window & Glass Services

**Emergency Services** – Their customers find them online and order immediately.

- Locksmiths
- Towing

**Here is an approved list of business categories to contact:**



## Home Improvement Services

- Appliance repair services
- Carpenters
- **Carpet cleaners**
- Closets, Countertops & Cabinets
- Electricians
- Fencing services
- Flooring repair, installation
- Foundations services
- Garage door services
- General contractors
- Gutter cleaning, installations
- Handyman
- Home Builders, rehab and additions
- Home security, theater services
- House cleaners
- **HVAC** (Heating, Ventilation & Cooling)
- **Landscapers**
- Lawn care services
- **Locksmiths**
- **Pest control**, animal removals
- **Plumbers**
- **Pool cleaners** & builders
- **Roofers**, siding
- Sewage & drainage system services
- **Tree services, removals**
- Water damage services
- Window cleaners & repair
- **Window replacement, new windows**

**We've done very well with those categories in red.**

## Business Services

- Accountants, Tax, & Bookkeepers
- **Auto Body Repair, Glass & Tinting**
- **Auto Mechanical Repair**, Transmissions
- Financial & Estate Planners
- Insurance – Independent Brokers
- Lawyers
- **Limousines**, Air/Sea Charters, etc.
- Marine Services
- **Moving & Storage**
- Oil industry related services
- Pawn shops, gold buyers
- Printers, **Screen Printing**, Awards
- Real Estate Brokers - Independent
- Steel Industry Services

## Personal & Healthcare

- **Chiropractor**
- **Day & Med Spas**
- **Dentists**, Orthodontists
- Dermatologist
- Doctors, Urgent Cares
- **Massage**
- Ophthalmologist, Optometrists
- **Pet boarding, grooming, training**
- Physical Therapist
- Podiatrist
- Studios – Yoga, Karate, Dance
- Tattoos
- Veterinarian

## Retail services

- Clothing, Shoes, Weddings
- Furniture, Lighting, Cabinets
- Gun Shops
- **Restaurants**, Pizza, Sports Bars
- Theaters, venues, fun things to do
- Travel & Entertainment



# Lead Generation Script

## OPENING

Good(morning/afternoon). My name is \_\_\_\_\_ and I am calling from Expansion Support Services 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.*

## Start asking questions and add the contact to HR (New Business)

- How long have you been open, or what year did you open the business?
- What is your best service?
- The correct spelling of your business name is....
- And please spell your name for me...
- Are you trying to expand your business...
- What is your company's website address?
- And are you located as (address)

## SETTING THE INTERVIEW APPOINTMENT – Add the Immediately Start the Online Form

Now, our consultant is going to interview you, then create the Spotlight article. When its done, you'll get a change to make edits and approve it.

What is good time tomorrow when you can set aside 15-20 minutes to be interviewed so we can complete the article?

Great. You'll give the consultant your approval, they will get the story published and show you how the general public can locate it online.

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.

Should the consultant call you on \_\_\_\_\_ (phone number) at \_\_\_\_\_ (repeat time)

What is your email address?

**Last question, you do want this Spotlight Story done on your business and you are willing to give our consultant 15 minutes to introduce company, Expansion Support Services, correct?**



## 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.