



SALES DIRECTIVE - CONFIDENTIAL

Revised September 21, 2025

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. PRACTICAL:** Go to <https://expansionsupportservices.com/appointments> and listen to the first 2 appointments being set.

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

___ **3. PRACTICAL:** Write on a piece of paper the business categories in red

___ **4. STUDY:** Read and study the Directive, “Searching out Businesses to Call”

___ **5. PRACTICAL:** Pick a state and create list of towns and cities that have between 20,000 and 120,000 people in them.

___ **6. PRACTICAL:** Generate a list of at least 25 US cities that have colleges with over 5,000 students.

___ **6. PRACTICAL:** Do Google searches until you can locate 3 pest control companies that have between 3 and 60 reviews.

___ **7. PRACTICAL:** Get access from the Trainer or your Manager to the Keywords by Category Google Sheet. Review 2 or 3 of the tabs containing business types and note that there will be a list of keywords and how many times these terms are searched each month.

___ **8. PRACTICAL:** Do a Google Search and find 3 plumbers in a college town in a city with 20,000-120,000 people and that have between 3 and 60 reviews but are not in the top 3 on Google Maps.



___ **9. STUDY:** Read the Directive, “Appointment Setters Administration” and its Daily Worksheet. “Daily Appointment Setting”

___ **10. PRACTICAL:** Go to and enter test data at:

[Https://expansionsupportservices.com/DailyWorksheet/](https://expansionsupportservices.com/DailyWorksheet/)

___ **11. PRACTICAL:** Go to and enter test data for the Weekly Report. The link to the Report is in the footer at the bottom of the ESS website.

___ **12. PRACTICAL:** Go to <https://countyadvisoryboard.com/> and review this website. We refer to this site as CAB.

___ **13. PRACTICAL:** On the CAB site, click on the Spotlights Tab and see a list of stories we’ve done. Using Chrome (browser), go to Google.com and do a Google search for Kris Griewahn, the first story in the drop down. Find it in the search results.

___ **14. PRACTICAL:** Complete the form at <https://countyadvisoryboard.com/spotlight-input/> using made-up data. Search the CAB website to locate the stories you created by searching the site by the artificial business. Read the story.

___ **15. STUDY:** Read, study and fully understand the Directive titled, “Spotlight Stories - Appointment Setting”

___ **16. 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.

___ **17. EXERCISE:** Drill (role play) with your trainer or another appointment setter the presentation until you get through it 2 times.

___ **18. PRACTICAL:** Go to <https://expansionsupportservices.com/appointments> and listen to 2 different appointments being set.

___ **19. FINAL PRACTICAL:** Get a Appointment Setting Worksheet and begin using. Search out businesses outside of Florida that are on page 2 or lower of Google searches when searching by a city and services.



Begin calling and continue daily generating Spotlight Interviews and Appointments until you have set 7+ appointments in one day. Once you have done 7 or more in one day you are considered a trained Expansion Appointment Setter.

While setting appointments, enter the prospects and their stories into the County Advisory Board website and make all updates in Highrise per your Highrise Training.



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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 cover our recurring fees.

- Swimming Pool Services
- Pest Control
- Dentists, Veterinarians, Chiropractors

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 Repair & Truck Mechanical and Engine Repairs
- New Windows, Window Replacements, Shutters & Glass Services

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

- Locksmiths
- Towing



This is the Approved List of business categories to contact:

Home Improvement Services

- ADUs (Accessory Dwelling Units, these are legal 2nd houses on a property)
- **Air Conditioning Sales and Service**
- **Animal removal**
- **Arborist (tree doctors)**
- Basement repair, remodels
- Cabinetry and custom woodworking
- **Carpet cleaners**
- Chimney Sweeping and Repair
- Commercial Cleaning and Janitorial
- Countertops
- **Concrete and Asphalt Companies**
- Dryer and Air Duct Cleaning
- Deck and Patio Construction Companies
- Dumpster rentals
- Drywall Install and Repair
- Electricians
- Excavating, digging
- **Exterminators**
- Fencing services
- Fire damage, restoration
- **Flooring repair, installation**
- **Foundations services**
- Garage door services
- General contractors
- Generator installation and maintenance
- **Glass & Mirror install, repair, replace**
- Grout and Tile Install and Cleaning
- Gutter cleaning, installations
- Hardscape, retaining walls, patios
- Home Builders – New
- Home Builders – rehabilitation, remodeling, renovations and additions
- Home security, home theater services
- Home siding
- House cleaners
- **Heating and Furnace Companies (HVAC)**
- **Installation**
- Interior design
- Irrigation
- **Landscapers**

Business and Misc. Services

- Accountants, Tax
- Airplane rentals, charters, flight schools
- **Auto Body Repair**
- **Auto – engine replace**
- Auto Glass Repair, Replacement & Tinting
- Auto Mechanical Repair
- Auto – tires and rims
- Auto – transmissions
- Boat rentals
- Bookkeepers
- Computer systems
- Hotels – privately owned
- Insurance – Independent Brokers
- **Lawyers, Attorneys**
- **Limousines**
- **Moving Companies**
- Office wiring, cabling
- **Printers, Screen Printing, Awards**
- Real estate – Independent (no franchises)
- Sports facilities, rinks, fields
- Telephone systems
- **Trucks and Semi-trucks Repair, Engine, Mechanical**
- Trade schools

Personal & Healthcare

- **Chiropractor**
- **Day Spas**
- **Dentists**, Orthodontists
- Dermatologist
- Doctors, Urgent Cares
- Events, rental facility
- Eye doctors, Glasses
- Hair salons (not barbers)
- Massage therapists
- Medical spas
- Ophthalmologist – advanced eye docs
- **Pet boarding**
- Pet grooming
- Physical Therapist
- Podiatrist



- Lawncare
- Lighting – exterior, commercial
- Locksmiths
- Marine Services
- Masonry (brick) Services
- Mold, asbestos and lead paint remediation
- Painters – Commercial and Residential
- Pest control – rodents, bugs, etc.
- Pest Control - lawns
- Plumbers
- Pool cleaners & pool builders
- Property mgmt. & vacation rental companies
- Remodeling – Kitch, bath, home
- Roofers – Residential and Commercial
- Sea Walls
- Septic tanks, pumps, well water services
- Sewage & drainage system services
- Snow removal – cold weather states
- Sprinkler systems
- Storage units
- Tree services, removals, stump removals
- Swimming pool builders
- Swimming pool repairs
- Swimming pool and spa cleaning
- Water filtration and treatment systems
- Water damage services
- Water proofing
- Window cleaners & repair
- Window replacement, new windows

- Tattoo Studios
- Urgent Care
- Wedding services
- Veterinarian

Retail services

- Coffee Shops
- Clothing, shoe stores
- Formal ware - Tuxedos/Dresses
- Furniture, Lighting, Cabinets
- Pizza
- Bakeries
- Restaurants – Steak
- Restaurants – Italian, Seafood, Breakfast
- Sports Bars

We've had the best success with the categories in red. 50% of your appointments should be set with the businesses in red.



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Searching Out Businesses to Call

Appointment Setters are given several criteria and then they search out businesses to call.

WHERE TO SEARCH?

Businesses can be found doing searches on Google, Yahoo, Bing, Apple, YP.com.

Directories that contain lists of businesses, such as, Google Maps, Trip Advisor, A2Z Business Directory, Better Business Bureau, etc. are resources.

Nearly every city in the United States has a Chamber of Commerce. This is a business affiliation that costs the business money to be part of. Nearly all of these Chambers have their own website and nearly all of them publish a list of their members. Simply search the city name and Chamber of Commerce, for example "Jackson Wyoming Chamber of Commerce".

When you come across an ugly website, often the web designer will link their company in the footer. Do a search by the link web designer name and locate other ugly websites. Similarly, using Chrome browser, you can do a search by "site:http://BadWebDesigner.com" replacing Bad Web Designer with the actual name and you may locate a list of the websites they have designed.

Companies that advertise on other websites, attorneys often do this, or on Google or Facebook already believe in spending money for online advertising so these are good prospects for ESS.

There are also directories of businesses. A popular and free one in the US is called A2Z Business Directory, which allows you to search by business type, size, location, etc.

POPULATIONS SIZE?

ESS is most effective selling and servicing businesses in communities with populations between 2,500 and 250,000.



Our prospects in super small towns are usually already dominating the internet so do not see the value in our services. We are not as successful delivering our services in super big cities with 250,000 or more people.

Major cities in the US are those that have a professional Major League Baseball (MLB) team, National Basketball Association (NBA) team, or National Football League (NFL) team in it. These cities all have 400,000 or more people in them.

Our most successful clients are in populations between 20,00 and 120,000 and often located near major cities. For example, there is a town “Palm Harbor, Florida”, which is about 15 miles from Tampa, Florida and it has a nice size, but not too big, population.

You can easily create a list of cities in the US, even by state, based on population size by doing Google searches. For example, type into the Google search bar “cities by population in Georgia” and you will get websites, usually government websites, that provide a list by largest to smallest. Download the list and remove those that are too small and those too big.

BACK TO SCHOOL?

We’ve discovered that we do better in towns that are expanding compared to those that are dying. By observation, cities and towns with universities and colleges appear to be thriving compared to others.

Here are some examples of cities that are thriving compared to close by cities that are not:

- Valparaiso, Indiana has Valparaiso University and is thriving compared to Hammond, Indiana
- Bozeman has Montana State University and is thriving compared to Butte, Montana
- Laramie Wyoming has the University of Wyoming in it and is thriving compared to Riverton Wyoming

You can easily locate cities with universities and colleges by searching Google.

REVIEWS?

Using Google and Bing Maps and their local listings, you can find businesses that have reviews.



If the business is in the first 3 listing in Google Maps, they do not need as much help as those that are 4 or below as Google lists and makes visible the top 3.

Our salespeople enjoy speaking to business owners with a few good reviews, from 3-60. These people understand the benefits of getting positive information about themselves on the internet and usually want more. Businesses that have hundreds of reviews often have many things figured out already, so we've not had the same degree of success.

Businesses that have no reviews and no websites can be sold but they often do not have the full understanding of what the internet can do for them, so they are a longer sales cycle.

The more Google reviews a business has the higher, usually, they will rank in Google Maps.

KEYWORDS

ESS provides its appointment setters with access to a Google sheet that lists 50-100+ keywords per business category.

For example, you can search "Jackson Wyoming, Dentists", but you can also search "Jackson Wyoming braces", "Jackson Wyoming Teeth Whitening", or "Jackson Wyoming Tooth Ache".

If you do not have access to the list of keywords, just search by what you would search for if you needed a service. For example, if your home's roof was leaking, you might search for "Jackson Wyoming Roof Repair", "Jackson Wyoming Leaky Roofs", "Jackson Wyoming Roofing Companies".

SEARCH AWAY!!!

Now that you have selected the cities and towns you want to call, you've selected the lead source (Google, Chamber of Commerce websites, etc.), pick a business type and search by the city + keyword.

NOTE: If you are an Appointment Setter setting appointments for Business Consultants that will be calling the lead, do not call Florida. We have an outside sales team that meets these business owners in person so we reserve these prospects for these business owners.

SUCCESS? Do not spend your hours looking for the perfect business to call, do a search and dial away. The most major source of failure for Appointment Setters is they spend their time searching out businesses to call instead of calling businesses and scheduling appointments.



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Appointment Setters Administration

1. Daily, Appointment Setters will keep track of the dials they make, answers, owners they speak to, appointments they set, appointments they reset and hours they work. See the below attached Weekly Production Worksheet. Print this off and use it or make one up using pen and paper.
2. At the end of the workday Monday-Friday, each Appointment Setter enters their Daily stats into a form at: <https://expansionsupportservices.com/asdailyreport>
3. To calculate how many of your appointments turned into Presentations, go to Highrise, click on Contacts, click on Companies Only, add a filter for the weekending date (example 250912 for September 12, 2025) and add a filter listing your name (exactly as you enter it on the form) as the person that procured the lead. This will show a total number and list the businesses.
4. At the end of each week and no later than 5:00 PM US EST, you'll enter your Weekly Report into <https://expansionsupportservices.com/ASWeeklyReport>. This Weekly Report is hyper-linked in the footer of the ESS website.

This will be the total production stats you produced and can be taken from your Weekly Production Worksheet. It will also ask for the hours you worked Monday-Friday 9:00-5:00 EST and the compensation you are expecting from ESS to be paid the following Friday.

5. Every Friday, Appointment Setters enter two weekending stats, Number of New Appointments Set and Number or Presentations Done from Appts Set into the ESS stats program at: <https://metapulse.com/>

Kurtis Kintzel



WEEKLY PRODUCTION WORKSHEET

Name: _____ Weekending: _____

	Monday	Tuesday	Wednesday	Thurs	Friday	Totals
Dials						
Answers						
Owners						
Appts Set						
ReSet Appts						
Presentations from Appts Set						
Hours Worked						



Appointment Setting 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 doing a spotlight story on your business. (*name of business*) was chosen because of your online reviews. Now the articles are free, this is our way to give back to the community and it gives us an opportunity to introduce ourselves to you.

I just need a few minutes of your time for a brief phone interview. You are the owner there, right?

If yes, start the questions.

If no, Alright then I need to speak to the owner.

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?
- What makes your company or services better than others?
- What type of training did you do?
- Do you have any specific licenses or certificates?
- Do you sponsor any groups or charities?

(Ask any other questions and complete the data input form)

APPT SETTING

Now you do get a chance to approve the article before we run it. What we do is called a live edit, one of our editors will give you a call back tomorrow. They will go through the story with you. You can make any changes or additions. Once you approve the story it will go live.

The editor will show you how access it off the website and how it will be stored on google to give your company more exposure.

Lastly, they will introduce our company, Expansion Support Services, to you and tell you how we've helped over 20k businesses bring customers through their doors.

Now they have a ___ or a ___ available tomorrow, what works best for you when you can be in front of your computer? Great! I have you confirmed for (tomorrow/Friday, etc.) at _____ (*eastern/central/mountain/pacific standard time*).



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 15 minutes of your time to introduce our company and services.

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.