

Guide to Onboarding Your New Appointment Setter

1 Orientation

Orient your appointment setter on the company's goals as well as your organization's sales process.



2 Training

Train them on product or service promotion and familiarize them with appointment tracking tools.



3 Scripts and Guidelines

Provide appointment scripts and guidelines that align with your company's brand and messaging.



4 Role-Play

Facilitate role-playing sessions to help them practice in a safe and controlled environment.



5 Lead Lists and CRM

Train them on how to use CRM to document interactions, schedule appointments, and track progress.



6 Sales Goals and Metrics

Set clear and measurable daily and weekly appointment targets for the appointment setter.



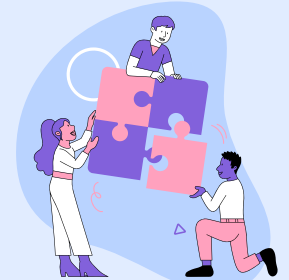
7 Monitoring and Feedback

Regularly monitor their performance and provide constructive feedback to help them improve.



8 Team Integration

Introduce your appointment setter to the team they'll work closely with to foster collaboration.



9 Resources and Support

Make sure they have access to necessary resources, such as sales marketing materials and mentorship.



10 Continuous Learning

Encourage continuous learning by providing training and resources to keep up with industry trends and best practices.



11 Performance Incentives

Implement performance-based incentive programs to reward them for every goal they met or exceeded.



12 Evaluation and Adjustments

Assess the appointment setter's performance regularly and modify the onboarding process as needed.

