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10 QUESTIONS TO ASK WHEN EVALUATING A B2B APPOINTMENT SETTING FIRM

INTRO

A robust sales pipeline brimming with valuable high quality prospects is the lifeblood of successful B2B companies. But how do qualify those types of prospects? Your sales team has to get in front of them, of course. And securing these meetings frequently requires a challenging and laborious calling campaign.

That's why hiring the right B2B appointment setting firm can make a major difference to your organization's bottom line. If you're seeking an appointment setting partner who can make valuable connections, identify companies you're able to help, and schedule appointments with qualified leads, it literally pays to evaluate each company using a strict, methodical process.

To ensure you select the right firm, Intelemark has assembled a list of ten vital questions to ask every B2B appointment setting company you may be considering. By using this guide as the foundation for your evaluation, you can feel confident you will make a good choice.

What is the company's reputation?

ONE

To gauge an appointment setting company's reputation, use these three criteria:

01

Track record

How well has the company performed in the past?

02

Client satisfaction

Do past and current clients recommend the service?

03

Validated success

Can you identify and contact reliable references?

An organization's track record includes factors like the number of years it has been in business, the number of years it has helped companies like yours, and its historical ability to help clients secure valuable appointments. Don't just ask the company point blank whether it can help you meet your goals; ask for examples of its success with other organizations either in your industry or other companies whose opinions you may value.

Client satisfaction ties heavily into a company's track record because it indicates whether organizations paying for services feel like the investment paid off. In the event you only have a limited amount of time to investigate a potential partner's track record, remember this: A contingent of happy clients is a very good sign.

If you're looking for a benchmark to gauge client satisfaction, consider a recent Intelemark survey indicating 98% client satisfaction with its services. To arrive at this number, we surveyed clients on whether they would refer us to other B2B organizations. Their responses were resoundingly affirmative. Look for satisfaction percentages like Intelemark's when researching a B2B appointment setter's track record.

Finally, don't take a company's published success stories or client satisfaction numbers at face value. Be sure to validate all claims independently. For example, if an organization published a case study on its website, request contact information for the person or people with whom the appointment setting company purports to have helped. Success stories aren't just a source of information– they can help you identify references as well.

Does the company have the right expertise?

TWO

IT ISN'T ALWAYS ABOUT HAVING INDUSTRY EXPERIENCE, IT'S ABOUT HAVING THE RIGHT EXPERIENCE

The appointment setting business is competitive, and effective players most often come to the table with substantial exposure to a particular industry. However, it isn't always about having industry experience, it's about having the right experience.

At Intelemark, our success comes from our ability to successfully deliver your value proposition in the language of your target industry. Our past experiences have informed our approach to business and also helped us identify verticals where we would have the greatest impact: healthcare, technology, and financial services.

How does the company manage campaigns?

THREE

Campaign management methodology differs widely among appointment setting companies. What's more, your idea of what constitutes effective campaign management probably differs from that of other organizations. While you may need to develop your own set of questions related to campaign management, be absolutely sure to ask prospective partners about the following:

BUSINESS GOALS

Among other things, you're trying to schedule appointments with qualified leads with the ultimate goal of increased sales. How will the company's approach directly address this goal?

SCRIPTS AND STRATEGIES

Who defines the strategy agents use when they're on the phone? Who writes the scripts? Who defines a lead as "qualified" and sets parameters for qualification? Be sure the firm enables you to play a significant role in all of those activities, no matter what.

AGENT COMMUNICATION

Find out who briefs agents on your strategy. Also find out how managers verify that agents are following protocol.

AGENT ACCESS

Will you ever have the opportunity to meet or talk to the agents working on your campaign? You should expect a weekly meeting where you can exchange information with agents and even critique calls, which will help you refine your campaign for optimal success.

The Intelemark method consists of a collaborative process that ultimately addresses your specific business goals and connects you with experience appointment setting agents. It isn't the only way to manage a campaign; in our experience, it's the best way.

How does the company manage your database?

FOUR

Your contact database or CRM application contains critical business intelligence that marketing and sales teams – not to mention your business – can't live without. How can you be sure you're partnering with a company that manages data responsibly?

One way is to look for a company that includes database management tasks within its regular campaign management routine. After all, updating contact data and collecting marketing and sales intelligence is the key to consistent appointment setting.

Companies move to new locations. They change names. Contacts move to new companies. Or change phone numbers. Or move to a new location within the same company. The status of a lead is always in flux!

Confirm that agents consistently update contact data for your leads. You should also be sure each agent is able to capture multiple fields of information according to your direction, such as marketing and sales intelligence.

Does the company use test campaigns to determine a fit?

FIVE

Experienced B2B appointment setting companies know they're not a good fit for everybody. That's why you should look for a company that's willing to begin with a test campaign – so both parties can tell whether a relationship has long-term potential.

A test campaign calls on you to make a relatively small investment to get a feel for how a company works, the quality of the appointments it secures, and whether a larger campaign will generate positive ROI. At Intelemark, we always start each new client with a test campaign as a proof-of-concept exercise.

Test campaigns proceed just like larger ones with the same level of collaboration and customization, albeit at a smaller scale. By the time a test campaign is complete, you know whether it makes sense to continue working with your vendor, and the vendor should know whether they can help you meet your revenue objectives.

A reliable, high-performing appointment setting company will not balk at the idea of starting with a test campaign, so don't be afraid to ask for one.

How does the company treat your brand?

SIX

If this question stumps a potential appointment setting partner, keep looking! Brand treatment matters because agents are representing your brand on every call, even if those conversations don't actually convert to appointments. Though you're hiring a third party to set appointments, the company takes on the secondary responsibility of being your brand spokesperson. You always want to spread a positive buzz about your company – to qualified leads, unqualified leads, non-leads, and anyone with whom you connect.

Attention to your brand attributes and public image should be part of any appointment setting company's campaign management approach. Not everyone your agent talks to will lead you to an appointment, but every conversation reflects upon your brand.

How does the company choose and prepare agents?

SEVEN

Lead qualification criteria, time spent understanding clients' objectives, getting to know the language of the industry – all of these factors come into play during agent preparation, and you should only hire a company whose agents are mature enough to excel at all of them.

But don't forget what comes before the campaign preparation. The way a company chooses agents matters, too. Agents should be skilled, experienced, and motivated. Do the companies you're considering take pride in agents' abilities or do they gloss over questions about agent selection? To gauge whether a company's agent hiring and engagement norms align with your needs, ask these questions during your evaluation:

Will the agents working my campaign be mature and skilled so that they can engage the prospect in meaningful conversation?

How will the agent know whether a lead is qualified and to only set appointments with qualified prospects?

Are your agents based in the same country as your customers?

Begin with these questions as a foundation, but feel free to add your own. The company you hire should be able to address all of your concerns in a way that gives you ample confidence.

How are agents paid?

EIGHT

YOU SHOULD ALSO BE PARTICULARLY LEERY OF HOURLY RATES THAT ALMOST SEEM TOO GOOD TO BE TRUE. IT'S BECAUSE THEY USUALLY ARE. VENDORS OFFERING VERY LOW RATES MAY BE ABLE TO DO SO BECAUSE THEY OUTSOURCE LABOR OVERSEAS, OR BECAUSE EMPLOY AGENTS WHO ARE NOT QUALIFIED ENOUGH TO DELIVER THE CAMPAIGN.

In B2B appointment setting, an agent's focus should be on the quality of the lead and its associated appointment – not the quantity. Commission-based telesales might work for some campaigns and in the B2C space where offers are commoditized, transactions are quick, and sales volume is high. But in the B2B arena, commission-based compensation can often encourage the wrong kind of behavior.

What reports do they provide?

NINE

Agents will make lots of calls during your campaign, and you need a way to verify the following:

- What was the day's level of productivity?
- How is the campaign tracking?
- Agents are asking the correct questions and populating the right fields in your database
- Agents are following up on callbacks and adding notes about contacts and conversations

Reports should also provide a baseline for your future success if you continue to engage with the company. Based on the ratio of calls made to appointments set, you should have a good idea of a company's long-term performance and potential to help you meet revenue objectives over the long term and to some degree project ROI.

Given the projected ROI, is the cost justified?

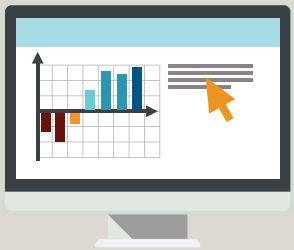
TEN

This is a question you should ask yourself after considering all of the factors discussed thus far. Remember, you're making an investment and choosing a B2B appointment setting firm is about return on investment and not about finding the vendor offering the lowest cost. Avoid choosing a company based on price alone. Instead of asking how much it will cost to work with a particular company, a better question is, "Will the price this company charges be justified by the results it produces?" After all, a low-cost company that generates zero appointments actually costs more than a pricier vendor that connects you with valuable leads.

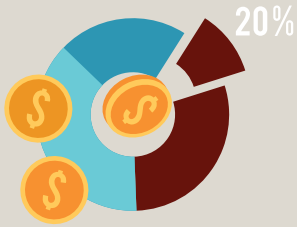
In this market, quality matters. From the quality of the agent's on your campaign to the quality of the appointments that you receive, numerous factors can impact your ROI.

We've addressed many considerations throughout this white paper that can have a positive impact on your ROI. For instance:

Vendors who provide test campaigns can help you recognize early on if your objectives will be met which could end up saving precious time and money.



Access to campaign reporting can also help you to refine your campaign so that it operates more efficiently.



The vendor's ability to manage your data can also have a serious impact on ROI, especially if it means less time wasted on outdated or non-viable contacts.

We hope you use this white paper to determine whether a vendor's overall approach meets your requirements. Then ask whether all signals indicate you will reap positive returns.

About Intelemark

Based in Phoenix, Arizona, Intelemark designs highly customized B2B demand generation campaigns to connect businesses with prospects and customers. Services include all aspects of sales pipeline development, including:

- Qualified appointment setting
- Sales lead generation
- Lead qualification
- Database cleanup
- VAR communication
- Tradeshow support
- Sales intelligence
- Direct response follow-up
- Market research
- *...and Emergency telemarketing*

To perform at the highest levels and deliver the best results, Intelemark pays careful attention to each client's brand. The company has partnered with many of the world's most prominent businesses and has earned a reputation as "The Business Connection Company." For more information, visit www.Intelemark.com.

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