



Fast Action Workbook

WORKSHOP: EFFECTIVE FOLLOW UP

SESSION 3: THEY MADE A RESERVATION OR AN APPOINTMENT

THE LAST FOLLOW UP CONTACT – CONFIRMING THE APPOINTMENT

When you call the day before the appointment day it is simply confirming the appointment and, if necessary, firming up the specifics, like the exact time.

You don't need a special reason to confirm the appointment because confirming the appointment is its own reason for calling. It is well within social norms to confirm an appointment and you won't offend anyone with your call if you approach it correctly.

Before we get into the nitty-gritty details about what to say and when to say it I want you to take a minute and clarify your thinking about one important concept and write a few sentences answering this question:

How is confirming the appointment an act of service toward the prospective customer?

WHAT TO SAY

Here is the sample phrasing used in the session: "Hey Mary, this is Kenny at SuperDeluxe Storage. I'm just a calling to confirm our appointment for tomorrow at 12:30 pm."

Or

"Hi Mary, this is Kenny at SuperDeluxe Storage. I know you said you would be coming in the middle of this week, so I have you tentatively scheduled for Wednesday. I just want to confirm the day and figure out if you plan on coming in the morning or afternoon."

Although most people will find this a pretty straightforward process, you should still take a minute and practice a couple of times. Instead of focusing on what you are saying, monitor your attitude and tone of voice. Listen to yourself to ensure you are coming across upbeat and positive. Listen again and make sure and that your attitude and tone communicate the assumption that they are going to confirm the appointment.

Practice: 1. 2. 3.

RESCHEDULING

There will be times when the prospect cannot keep the appointment you originally agreed to. You have put so much effort into this sale already; this is not the time to let your guard down.

Rescheduling is the easiest way to keep the sale moving forward. It is the easiest way to help you prospective customer have a good experience because you will be able to plan for and be prepared for the visit.

Here is the sample phrasing used in the session: "Ok Mary, no problem. Let's just figure out a time that works better. Would a different time tomorrow work better for you or would you prefer a different day all together?"

The template is:

1. Acknowledge that you understand the appointment won't work: "Ok Mary, no problem..."
2. Offer some new alternatives: "Would a different time tomorrow work better for you or would you prefer a different day all together?"

As far as alternatives go, you can come up with whatever you think will work. You might ask, "What would work better for you as a new time... Later this week or Saturday?"

The main point is to get the momentum of the conversation going toward a reschedule. It doesn't really matter if the alternatives you suggest are good or not. **Once you ask the question, just pause and give the prospect room to talk.** If the alternatives don't work, then they will tell you and propose something else.

You should practice this until rescheduling seems second nature. Practicing will also help you get a little more comfortable setting the initial appointment because it is done in a similar way.

Write out your approach in the space below.

Remember to say it out loud a few times. Sometimes what you write down sounds odd or stiff when you say it out loud, and you might decide to adjust.

Now that you know what you are going to say, practice with a coworker or a friend. Have the other person play the part of the prospective customer and you play your role as the person representing the business. A little practice in a safe environment will do wonders for your confidence and effectiveness. The key is to get to a point where it flows naturally and you are able to consistently guide your prospect toward a reschedule.

The first times through were to get it to sound right. Now you are trying to get it down into your brain so that you can say it when you need it. Trust me on this. Feel free to check off your practices below if it will give you a sense of accomplishment 😊.

Practice: 1. 2. 3. 4. 5.