



Inbound Appointment Setting: An Attractive Alternative to Cold Calling

by Desiree Gordon

The commitment to sales is crucial to any product or service, team and business owner. Yet, sales can be a revolving door—sales tactics are constantly being tweaked with new techniques, sales teams are being challenged by change and marketing efforts are instrumental when selling a product or service. The million-dollar question is, how do you, as a business owner, generate more leads, more business and more money? Questions arise such as, “How do we get a return on investment (ROI)?” I’d like to make a case for an alternative or complement to cold calling in this fluctuating world of sales.

There is conflicting advice online and among business owners. I recently wrote a blog titled: [Kill the Cold Call](#), but there are other headlines out there such as “Cold-Calling Isn’t Dead, You Just Don’t Have the Guts!” It can become confusing. I’ve cold-called, exceeded quotas, worked with third-party calling vendors, searched for decision-makers and compared revenue caps or spending budgets that matched our scope of service. While cold calling remains an effective tactic, it may be worthwhile to consider a new approach.

Let me introduce you to inbound appointment setting (IAS), so that you can make an informed decision about which approach works best for you. Cold calling and IAS both include selling by picking up the phone and making many follow-up attempts. Where they differ is in the capture of information and first impressions.

Since most are familiar with cold-calling, let’s start there. In my experience, cold calling benefits include:

- High volume
- High-priority decision-makers
- Numbers game: quantity of leads at top of sales funnel
- Sales team is in charge of its own timeline and quota

Cold calling detriments include:

- Unclear sources
- Purchased list data that is sometimes outdated or has wrong information
- Time investment with smaller odds
- Scripted intros
- Employing and training skilled sales professionals
- Longer sales cycle
- Not focused or targeted efforts
- Bad first impression/customer service
- Low reach rate – meaning many people don’t pick up the phone or respond
- Often inefficient

An average sales rep makes 52 calls a day, with 15 percent of their time spent leaving voicemails. That’s 36 hours of wasted time every month...36 hours you could be spending making more calls and closing more sales.

What is Inbound Appointment Setting?

Just as digital enhancements, automation and technology have made us better marketers, why not use these tools to make us better salespeople? For the past two years, our firm has achieved success through IAS, which utilizes marketing campaigns, content, tracking, form submissions (we set up through HubSpot) and reporting to demonstrate ROI. This approach encourages efficiency, automation and collaboration. Although there is not as much immediate volume as when you purchase a list from a third party, you achieve quality leads over time, which speeds up the sales cycle and helps the sales team close faster.

Rather than buying a list, marketing helps to generate leads. Our marketing team writes content (blogs, gated content such as e-books or infographics); it is optimized so Google will bring viewers to us. Once users access the information, we set up forms in HubSpot that send an automated email to our sales team. Here is what it looks like:

HubSpot	<p>Project Type: Marketing</p> <p>utm_campaign: MKTG</p> <p>utm_medium: ppc</p> <p>utm_source: adwords</p> <p style="text-align: center; margin-top: 20px;">View in HubSpot</p> <div style="margin-top: 20px;">  <p>CONTACT Desiree Gordon</p> </div> <div style="margin-top: 20px;">  <p>COMPANY Skoda Minotti 440-605-7199</p> </div>
<p style="text-align: center;">Contact reconversion by submitting on HubSpot Form "SMKT: CPA ContentPlus Form"</p> <hr/> <p><small>Page submitted on: CPA ContentPlus Blog Content for CPA Firms Newsletter Content for Accounting Firms</small></p> <p>First Name: Desiree</p> <p>Last Name: Gordon</p> <p>Phone Number: 4403411362</p> <p>Email: djgordon@skodaminotti.com</p> <p>Website: skodaminotti.com</p> <p>How can we help?: Demo</p> <p>Message: TEST</p> <p>LeadSource: Firm Website</p> <p>Topic Name: CPA ContentPlus</p>	

These forms provide contact information for a prospect, and automatically add the data in CRM. Once you have this information, either your sales team or a dedicated team member follows up on the leads to further qualify. This is IAS. In our case, a dedicated team member follows up on the lead and assigns it to a subject matter expert, if the lead is a qualified opportunity.

We include customized questions/fields like phone number, email and a qualifying question, such as, "Would you like to receive follow-up?" We track the lead source and campaign, which is a key component for measuring ROI. Since everything is trackable through this form, we can gauge how many conversions we received, how they found us and which campaign it came from. This is helpful at the end of the year, when you are planning marketing budgets.

IAS is a service that should work in tandem with other marketing and sales efforts for new business development. This approach can be very successful, but you need content, search engine optimization and the right team to make it work. When all those work together, the sales cycle becomes shorter, there are more qualified opportunities, the sales team has a full pipeline and decisions can be made on what to spend on marketing. You also have a trackable and measurable way of getting revenue.

IAS Benefits:

- Targeted prospecting efforts
- User- or customer-focused

- Contact information provided by the prospect
- Point of interest for the user (know which pages and conversation starter)
- Efficient and automated
- Better user experience/customer service
- Helping, not selling, approach
- Trackable follow-up efforts in CMS
- Updated information (company name, website, etc.)
- Faster sales cycle

Detriments:

- Relies on effective communications with the marketing team
- More time spent reporting and tracking
- Smaller pool of leads (although they are more qualified)
- Must be prompt
- Having enough leads to fill the pipeline
- Must use other sales and marketing tactics – this could be a time investment

This is not an attack on cold calling; perhaps you need both tactics to accomplish your goals and hit your ROI. I am simply introducing a way to increase efficiency and have your team work closely together. I am also suggesting a more strategic approach to your marketing plan and decision-making process. As you can see, IAS offers many advantages—*if* all the pieces are in place. If you are not getting the results you want from cold calling alone, and are frustrated by the process, you may want to consider investing in a fresh approach.

I'd be happy to discuss your lead generation process with you. I'd love to connect by phone at 440-605-7235 or by [email](#).