

# 5 TIPS TO BOOK MORE MEETINGS WITH YOUR SCHEDULING TOOL



## WHY AREN'T YOU DRIVING MORE APPOINTMENTS?

Let me guess. You adopted (or may be thinking about adopting) an appointment scheduling tool because you wanted to make scheduling easier, which hopefully would result in more meetings and more tickets. You have read how schedulers cut down on the back and forth of securing meetings, allows you to be available when advisors need you, and gives advisors the ability to personalize meetings.

So, the question is why aren't you driving more appointments? Most likely you have not planned a strategy on how you will use appointment booking and how to make it clear to advisors that you have this new tool. Wholesalers who plan an appointment booking strategy are reinvigorating their territories. Over the past 12 months we've seen internals add 2+ hours of talk time per week and externals pre-securing 5.7% more meetings.

Below you will find the top 5 must-have tips from wholesalers on how to build an appointment booking strategy that drives meetings and ultimately sales.



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1

## ENSURE YOUR SCHEDULING TOOL HAS THE "RIGHT" FEATURES

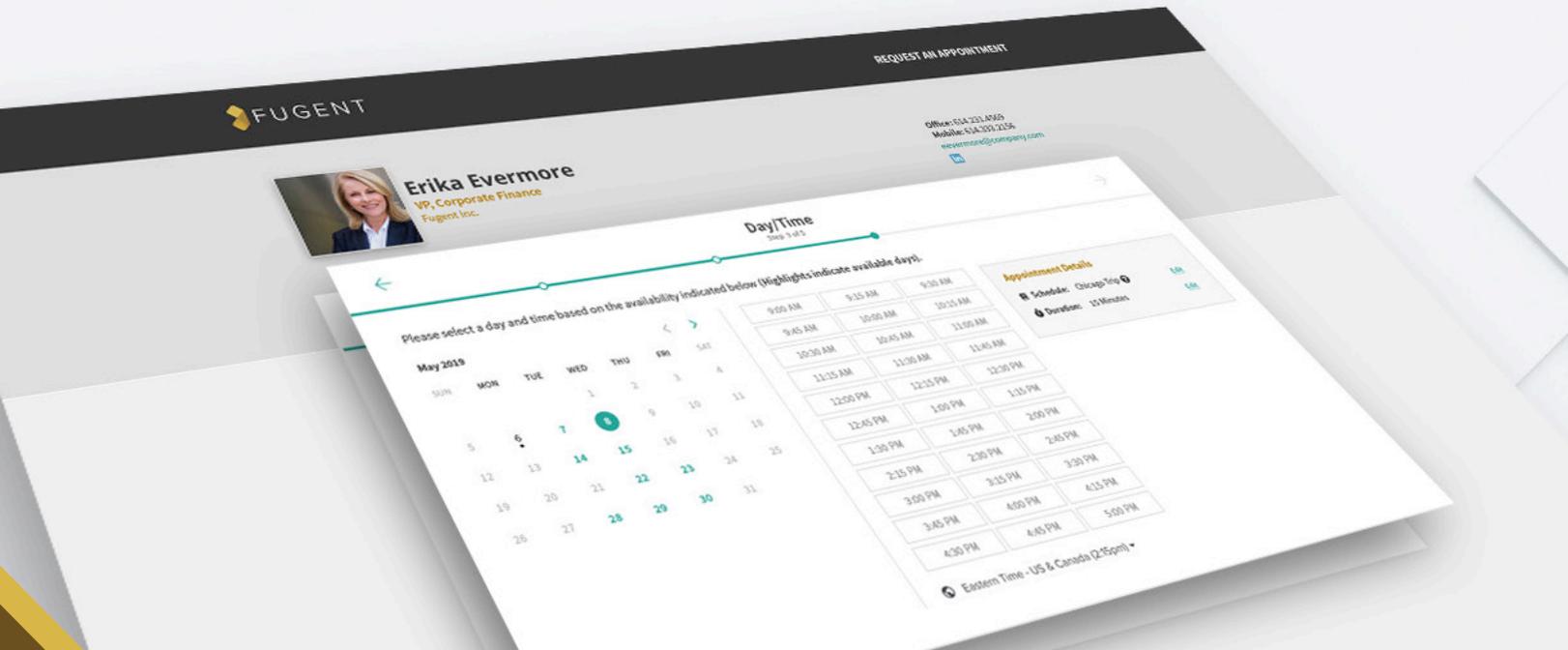
After twenty years and hundreds of wholesaler technology deployments, we know the key to success is not buying the technology but implementing the right strategy. That being said, you should ensure that your scheduler has the required features to satisfy wholesalers, compliance, IT and marketing. No small task...we know.

Free or low-cost scheduling tools may work for the salon or the individual down the street, but they lack the integration support, security, and compliance controls that financial service firms require. Alternatively, big-name enterprise solutions may check the box for IT, but they don't offer distribution the flexibility and customization needed to seamlessly integrate into territory activities and ultimately gain adoption.

BIG-NAME ENTERPRISE SOLUTIONS MAY CHECK THE BOX FOR I.T., BUT THEY DON'T OFFER DISTRIBUTION FLEXIBILITY.

Below is a list of must-have scheduling features for distribution teams.

- **White-labeled scheduling experience** that is customizable for your firm and wholesalers to build brand loyalty and humanize the relationship
- **Rotation scheduling support** (i.e. the ability to build zone schedules with custom date ranges AND specific days and times) to increase adoption
- **Territory collaborative scheduling and shared notifications** to extend the team and create timely follow-up
- **Integration into territory activities** such as lunch and learn follow-up, web meeting management, content distribution, and digital territory maps to meet advisors where they are already engaging
- **Calendar, CRM, and web meeting integration** to build efficiencies and maximize ROI
- **Roll-up reporting and analytics** to gain insights into advisor preferences and behaviors while understanding which territories or channels are moving the needle.



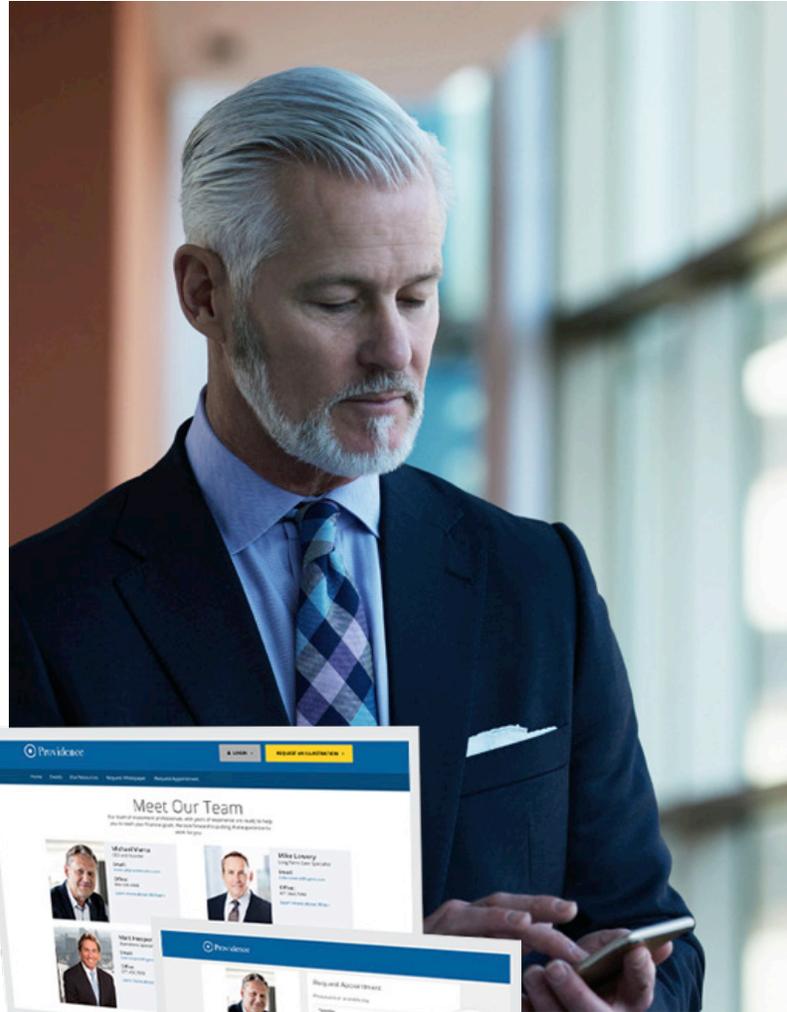
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## CUSTOMIZE THE EXPERIENCE

You've implemented appointment booking to make it easier for advisors to schedule a meeting with you. And yes, part of that experience is giving your client flexibility to make an appointment with you. However, this doesn't mean you should leave all the work up to the advisor. Sometimes too many choices can prevent clients from making decisions. Think about a restaurant you recently visited with so many options on the menu that it paralyzed your ability to order.

Instead, think about the who, the what, and the how. Who will be scheduling meetings with you? What will they want to discuss? How will they want to meet? Answering these core questions can help you specialize the booking experience for your clients.

Do you specialize in a couple different products? If so, setup a schedule for each product such as mutual funds, life insurance, and annuities. Do you commonly host a couple different types of meetings on your product? If so, setup a schedule for each type of meeting with the pre-determined length for the meeting. For example, 15-minute introduction to Providence annuities, 30-minute illustration review, etc. Do you travel to different geographical areas? If so, setup a schedule for each city and one for your phone/web meetings.



THE GOAL IS TO HELP STEER YOUR CLIENT IN THE RIGHT DIRECTION WITHOUT OVERWHELMING THEM.

3

## DON'T FORGET TO TELL YOUR CUSTOMERS

Remember the movie Field of Dreams and the famous phrase, “If you build it, they will come”? Unfortunately, this outcome doesn’t translate to appointment booking. It’s not enough to setup your schedule and hope that clients will find it. If you want clients to start booking meetings, you have to create a strategy for driving awareness. And if you are thinking one email is going to do the trick, you will be disappointed.

The most successful wholesalers make it very clear to advisors that they have a new, easy way to book meetings and they introduce it through a variety of channels. A dedicated introductory email campaign to current clients is one of the most logical places to start. Next, think about all of the places that your advisors interact with you and make sure that you integrate appointment booking.

### Some ideas include:

- Link in your email signature
- Instructions in your voicemail greeting
- Link on your territory website or training website
- Link on territory maps
- Link on your business card
- Link on your social media profile



4

## PARTNER WITH MARKETING

It's no secret that advisors are accepting less and less wholesaler calls and meetings. Now more than ever, firms are having to invest in the client experience and build avenues for advisors to interact on their terms. Marketing is leading the charge to create targeted advisor experiences that make it easier for advisors to research and conduct business. But, at the end of the day the firm's investment in the client experience is being measured by an uptick in sales. ROI is forcing marketing and distribution to work together to integrate wholesaler activities into the digital client experience, extend the sales team, and create higher quality inbound leads.

One place to start is by integrating wholesalers' appointment booking into marketing assets such as corporate websites, advisor portals, and email campaigns. Marketing is able to track not only advisor interest but how their initiatives directly convert to sales appointments. Wholesalers can build visibility in a professional, brand-consistent environment and ultimately gain meetings from a pool of advisors that they might not typically reach on their own. Finally, advisors can easily access their wholesaler whenever they are ready.

If you have launched your scheduling tool and not incorporated marketing, you are limiting your ROI. Marketing should be a key partner in choosing, implementing, and promoting scheduling software.

**Here are the top responsibilities that marketing owns to drive more appointments:**

- Customizing the scheduling experience so it is seamless with your firm's brand and digital experience
- Capturing wholesaler links to integrate into marketing campaigns and assets such as advisor portals, new product launches, etc.
- Analyzing enterprise reports to understand trends at the topic, advisor, or territory level
- Iterating marketing initiatives based on trends
- Integrating data into CRMs and marketing tools to feed advisor scorecards, marketing automation campaigns, etc. so that the next touch point with the advisor is more relevant

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5

## BREAK OLD HABITS

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Most likely you are sending clients and prospects content such as product brochures, thought leadership, illustrations, etc. and ending the email with a request for a meeting. You might also leave voicemails with a request for a meeting or trade numerous emails containing your availability. Increase the effectiveness of these communications by using your appointment scheduling tool as a call to action. It may feel direct the first couple times, but keep in mind it's easier for advisors to respond to or express interest by clicking a link rather than trading emails and voicemails.

And when you find yourself in that old habit of trading a long list of available times, don't be afraid to point out a link to your availability. Better yet, send an email through your scheduling tool suggesting 4 or 5 available times, so that your advisor doesn't have to sift through all of your availability. There is some low hanging fruit when it comes to making your current scheduling practice more efficient. Try breaking old habits by encouraging a call to action through your appointment link and you will book more meetings in less time.

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In the end, appointment booking can drastically increase the number of meetings on your calendar with less effort, but you have to be consistent. The timing might not be right when you reach out the first time. Therefore, it is important that you build consistency into your strategy. Consistency with a relevant message will help ensure your advisor can always reach you.

**Cheers to a full calendar in 2020!**



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