

**Prospecting
and
Setting Appointments
Made Easy**

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PUBLISHING HOUSE



151 Howe Street, Victoria BC Canada V8V 4K5

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*Prospecting and
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ISBN 978-1-927755-16-7 (paperback)

ISBN 978-1-927755-17-4 (ebook)

Cataloguing information available from
Library and Archives Canada.

Printed on acid-free paper.

Ago Publishing House is a socially responsible company,
measuring success on a triple-bottom-line basis.

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Introduction

You can have the greatest idea, product or service to sell, but if you are unable to get people to listen to your presentation, chances are highly unlikely that you will succeed in making enough money to actually have a financially profitable business.

This book is for people who need to set appointments with other people to be successful in sales, relationships and life.

The tips contained here are mostly for beginning sales people to help them to properly approach and set appointments to make presentations to their “warm market” – essentially their family, friends, colleagues and acquaintances. This is not about cold calling or telemarketing, although the tips contained herein may help in those situations as well.

Experienced, seasoned veteran sales people who may be in a “sales slump” can also benefit by reviewing these basic and time-tested fundamentals. Sales managers will also benefit by giving their salespeople these tools to help them grow their clientele. This, in turn, will grow the manager’s business.

This book is also for everyone and anyone who needs the cooperation of others at some point in their life and career. Getting people to listen to what you have to say is an important life skill. Once you learn these skills, you will have the keys to not only getting others to sit down and listen to you, but also how to teach these skills to others and empower them.

It’ll even help you get dates. Yes. It’ll help single men and women get dates. Because let’s face it, isn’t asking someone for a date, the same as asking for an appointment to make your best “pitch”? You are essentially selling your most valuable product – YOU. It is fundamentally the same when selling any product. You *must* first SELL YOURSELF.

How you approach the delicate art of asking for an appointment (or a date) may be the difference between success, frustration or failure in any arena of human interaction.

He or she who sets the most appointments will win over the long range. Why? Because having more appointments leads to more opportunities to give your presentation and ask for business. More closing opportunities leads to more sales and more income. You practice and polish your presentation and closing skills more often. You also develop a certain type of mental

toughness that it takes to succeed in business because you experience more rejection, and learn how to minimize it and overcome it.

Rejection, like resistance in weight training, builds muscle – in this case, mental muscles.

One of the greatest rewards most winning sales people achieve is the mental toughness and positive mental attitude they develop. They believe they can accomplish anything ... and consistently *do* achieve their goals. This, in turn, enables them to pass that belief on to others who are looking to them for leadership and guidance, especially their children.

1 My Story

From Zero to Hero

I started selling financial services (term insurance and mutual funds) in April of 1986 at age 26. By December of 1987, I was earning \$10,000/month*. In today's dollars that would be \$20,000/month. I started recruiting and training others to do the same thing and built a number of successful financial services businesses. I followed the same financial advice I gave my clients and associates and became financially free at age 30 with a residual income of over \$100,000/year.

I took a couple years off, and then started again in a

* Of course, with this and all other incomes cited in this book, there is no guarantee other agents will achieve this level. The incomes one can achieve will vary widely according to skill, work ethic, ability and other factors.

city where I only knew 2 people and doubled my income to \$200,000/year by 1993, and doubled it again by 1999. I semi-retired at age 42 and fully retired by age 50.

Despite this success, however, sales (prospecting, setting appointments and selling), was not my chosen career path.

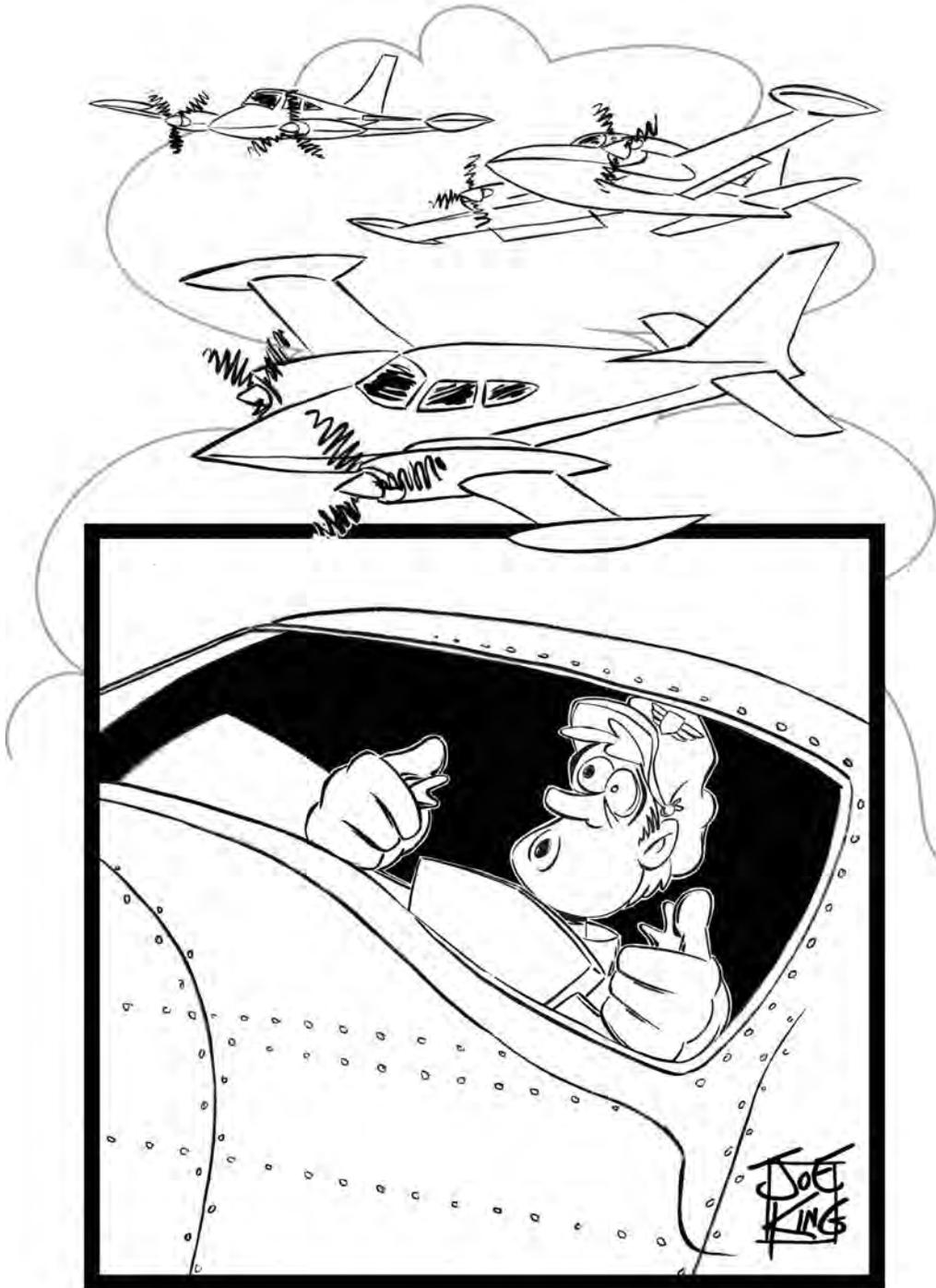
I am a pilot by trade and an introvert by nature. I graduated with a diploma of Aviation Technology from Selkirk College in Castlegar, BC in 1982. Being that it was one of the best airline prep schools in the country, it was very expensive. But my parents and I thought it was worth it as it seemed virtually guaranteed I would be hired by a major airline right out of school.

Unfortunately, the country plunged into a big recession and the airlines were laying off hundreds of pilots. So I was forced to look for any fly-by-night charter airline that would hire me so I could build my time and pay off my student debts as well as survive. My first job was flying for a small company that paid me \$500/month for about 10 hours of duty time a day. My rent was \$250/month for a bachelor suite. I was so broke I could barely afford to put gas in my car or food in my belly.

My next few jobs were a little better, raising my pay to about \$1,200 a month and allowing me to fly nicer aircraft. But again because the economy was so poor, I was laid off 5 times and fired twice in a span of 3 years.

I eventually landed a great job... (get it? Landed a job... pilots 'land' airplanes... Okay, never mind. That joke crashed and burned.)

Anyway, I landed a job flying charter in California and thought I had finally found my dream career path.



One day a pilot friend invited me to a seminar that really opened my eyes about how the financial services industry seemed to be taking advantage of consumers and our lack of financial education. I was very impressed with what this new company had to offer in terms of education and opportunity. They talked of writing my own paycheck, being my own boss, helping others to become financially independent. They said if I worked hard I could make \$100,000 dollars a year by the time I was 30. I was 25 at the time, and also naive enough to believe that pitch. Much to my parents' extreme dismay and disappointment, I decided to leave my career as a pilot to begin a career as financial services sales person.

My dad warned me that the “pitch-men” were probably scamming me. The pitch that promised me I would be making \$100,000 in 5 years was indeed incorrect. I made \$100,000* in my second year. That sounds fast, but it was not easy. I worked 10 hours a day, 6 days a week mostly learning how to set appointments and sell, and then recruit and train others to do the same thing.

I learned by listening to others, and practicing, screwing up, practicing, screwing up and practicing some more. I hated the rejection, feared the phone, and wasn't outgoing enough to meet a lot of new people. But I wanted to succeed in the worst way.

So I took sales courses, read books, listened to older, experienced sales people. They all seemed super confident, and in my

* Again, a reminder that agents' incomes cannot be guaranteed. Actual incomes one will achieve vary widely according to skill, work ethic, ability, and other factors.

opinion, often super pushy. I was turned off by their techniques. I just didn't feel comfortable saying or using some of those techniques with friends and family. Their words and phrases sounded "smarmy" and manipulative. I was looking for words and phrases that felt... well ... warmer, friendlier, more honest. Ones that even if the person said no, I wouldn't feel the sting of rejection so bad. Moreover, I wouldn't lose friends if they weren't interested in what I had to offer.

It's the rejection of friends and acquaintances that often paralyzes and/or kills most beginning sales people. "I'm not a salesperson" is a common refrain from people who have been rejected too early in their first attempts at trying to set an appointment or sell something. That's a shame, because almost all of us have to sell something at some point in our lives.

So **I developed a system of setting appointments** (and selling) **that made it almost impossible for people to reject me. It was a way to set an appointment with almost anyone.** Does that mean everyone set an appointment or did business with me every single time? No. Nothing works 100% of the time. But this system worked *almost* 100% of the time, for me.

Through my seminars and coaching, I have made appointment-setting easier and more successful for hundreds of aspiring sales people. Now I feel it is time to put these techniques in writing to help other sales people I can't teach personally. Hence this book you have in your hands.

Let's start by understanding that Prospecting and Setting Appointments are two different skills.

2 Prospecting

The Art of Finding Potential Clients and Associates

I loved the service I provided. I was excited about presenting it to people because the idea was really beneficial and practically sold itself! There was only one small problem. I was afraid to pick up the phone and ask people for an appointment to show them this exciting idea.

I was always amazed, and at the same time, discouraged by the people in my industry who didn't have any fear of approaching people. They could pick up the phone and cold call out of the phone book. They could walk up to complete strangers, start a conversation, and ask for their name and number and a time to call ...

They called it "Prospecting."

I called it “Terror on the Midnight Express.”

They had thick skin, and rejection seemed to flow off them like water off a duck’s back.

I am the kind of person who walks across the street to avoid talking to people I already know. I was happy being a recluse. Now that I was in sales, I had to actually talk to strangers? Cold call? I was doomed. In an industry full of Lions and Rhinos I felt like a Gopher.

The Lions and Rhinos would go to malls, restaurants, job fairs, any place where they could chat up strangers to interest them in making an appointment. Some even went door to door! They even asked me to go with them! Talk about scary and humiliating!

When I was out shopping, I would see this perfect couple with kids, walking casually in the mall. I would get up my courage to stand in their geographical proximity, and wait for the opportunity to talk to them. Sometimes they would start talking to me!

“Are you from around here? We’re looking for the nearest drug store.”

I would happily point them in the right direction and watch them smile, thank me, and walk away into the sunset. I could never summon the courage to “prospect” them! Damn it! I am such a LOSER! My colleagues or my wife would ask “Did you get their number?” Each time, embarrassed, I’d have to say no. I HATED prospecting!

On one unsuccessful, and completely miserable, afternoon

I just went home. I pulled out my meager “prospect list” and lamented that I hadn’t added any new names to it in over a week.

That’s when it dawned on me.

I had names to call on my list already. If I had names on my list that I hadn’t called yet, what did I need to get new ones for? If I was too chicken to call people I knew, what did I need new names of complete strangers for?!

Furthermore, as I glanced down the list, I thought of a couple of new names that I had forgotten about. Wait! I just added 2 new names without having to go “mallng” and prospecting! I was excited! I thought if I had 50 names on my list, and called 5 a day, that would give me 10 days before I had to start looking for new names! And what if some of those 50 actually wanted to see me and became my client? Maybe they would give me referrals! If I had 10 happy clients that gave me 5 names each I would fill up my prospect list all over again without ever having to do the dreaded prospecting ever again!

So I developed a *new* definition of prospecting:

Prospecting is nothing more than “*putting names on a list.*”

Appointment setting is different from prospecting.

***Setting Appointments* is how you contact those names and arrange a time and place to meet.**

Which is a separate skill. If you break the skills up into manageable tasks and learn the steps to each, it makes the whole process of prospecting and setting appointments less onerous.

So if you already have some names on your list, you can skip this chapter and go directly to chapter 4 and work on how

to successfully contact and set appointments first. If you run out of names, you can come back to this chapter to learn ways to fill up your list.

For those of you who desperately need a bigger list of names before you can start calling, read on ...

Adding Names to your Contact List

I've heard it said that we all know about 450 people. If that's true, and we could contact them all, and set appointments with only 20% of them, that's 90 appointments. Divided over 6 months that's approximately one appointment every working day with weekends off. If 30% did business with you that's 27 new customers. If you earned \$1000 per customer that's \$27,000 in earnings in 6 months. If you got 5 referrals from each customer, that's another 135 people to call. Chances are, with your increased experience, confidence, and the benefit of happy clients endorsing you, your closing ratio would go up. Your income would naturally follow suit.

That's what happened to me... sort of. I made a list of people I knew from friends, family, school, my wife's friends and family, my former place of work, etc. My list totalled 75 names.

The problem was, I was scared to pick up the phone to call them. I wasn't sure what to say. I was afraid they would say no. I was afraid that I would lose not just an appointment, but possibly a friend who would avoid me. I didn't want to sound like an over-excited, pushy "salesperson". I was afraid that they would laugh and say, I know that stuff already! Or I'm already doing

that with a big brand name company, I've never heard of your dumb company!

Most of those fears were made up of course, but they were good enough to paralyze me for hours in front of the phone trying to write "just the right script" and build up enough courage to pick up that 500-pound phone and call someone!

Eventually, as my bank account shrank, and my hunger and desperation grew, I forced myself to start calling those 75 names. It was agonizing, but also exhilarating as I actually started to set, and do, appointments. Some did some business with me and some gave me referrals. Their referrals took me into new markets where I developed different friendships, and centres of influence. Those new friends referred me on to their friends and relatives and so on.

Because I had to keep calling referrals and new contacts every day, just to make a basic living, I actually got better at it and develop my own method for prospecting and setting appointments that actually started to make this "scary task" fun and easy. Not just for me, but for many other aspiring reps, agents and salespeople as my business grew. Today, I have a business that has thousands of clients, and hundreds of agents, seeing hundreds of new families monthly. Yet after almost 29 years, I have never actually contacted the 75th person on my original "Prospect List".

So, whether you believe it or not,

"You Have an Unlimited Market."

If you learn how to set appointments properly, you will be able to,

"Set an appointment with almost anyone."

Therefore, you will always be able to make a living and maybe even make a killing.

“All well and good,” you say. “Except, I don’t know 450 people. In fact, I only have 10 people on my contact list. And they are all ‘tired of hearing from me’. Or, ‘I don’t know what to say to them’, or I’ve called them and they said, ‘Not right now’ or ‘I’m busy’ or ‘I’ve already got what you are offering,’ etc., etc., etc.”

Sometimes just staring at your meagre contact list paralyzes you to the point where you don’t contact them for fear of “not having anyone left on your list.” You would be out of business! So you just keep your list as a souvenir of hope like a family heirloom on your mantle-piece, collecting dust.

It’s like opening your refrigerator looking for something easy, convenient and savoury to eat and seeing nothing readily available. So you shut the door. But you are still hungry so you open it up and look again. Still nothing. You may even do that two or three more times. Waiting for something delicious to magically appear that’s easy to eat. Damn it. Still Nothing. But you are starving! How come there’s no supper on the table?! How comes there’s no food in my fridge?! How come no one got groceries?! How come I’m still single?! Can you relate? No? It’s probably just a guy thing.

So now, you have a problem. You are starving and there’s nothing in your fridge that’s easily edible. So you have two choices: Go grocery shopping or get creative with the food you have in the fridge and cook something!

Same as your prospect list. You keep staring at it hoping a name will pop out at you that is an easy one to call. An easy

appointment, a sure client that will make you some money! Because you are broke! But there's nothing "easily edible or sellable" on your prospect list. So you have two choices: Go get some more names, or get creative with the names you have and make an appointment with them! (See chapter 5.)

But for now, let's just go grocery shopping and fill up your fridge. I mean your list.

Bearing in mind the definition of prospecting is **"Putting names on a list"...**

1. Make an appointment with yourself for 45 minutes.
2. Pull out your contact list or a note pad where you can create a contact list.
3. Open your contact list on your cell phone or paper phone list. Go down your list and take names that you want to call off that list and write (yes, write) them on your separate prospect/contact list.
4. Open your calendar (electronic or paper). Starting from last week, go back through it and look for names you have forgotten about. Go back as far as you can in the time you have allotted yourself for this task (45 minutes).

Did you add any names to your list? (It's like looking into the far reaches of your fridge and finding a savoury "left over". Yum! You gleefully devour it to satisfy your hunger.)

Sometimes you stumble across that great prospect

on your list that told you they were interested but had put you off and you forgot about her. You gleefully pick up the phone and set an easy appointment to satisfy your hunger for a sale.

But DON'T DO THAT YET! Resist the temptation to make that call until you get to Chapter 4. I will explain why later. Suffice to say for now, **“you can't fix problems with the same habits that created them in the first place.”** Putting it another way... if your fridge is chronically empty ... **It's not the fridge's fault.**

Another refrigerator analogy before we move on....

Have you ever looked into the far reaches of your fridge and found mouldy leftovers? What do you do? Ladies, you throw it out immediately, don't you? In fact you look at the expiry date and throw things out before they get mouldy. Guys will take the lid off, look inside, smell it, then cut off the mouldy parts and eat the “non-mouldy” parts if they are really hungry, or really lazy, or really broke. I know. It's Gross. Guys! Just throw that stuff out and clean your fridge before it becomes a science experiment! Remember how much you enjoyed science in high school? Oh wait, you didn't enjoy it. That's why you are in sales.

Your prospect list has mouldy leads on it as well. You know... the ones that keep putting you “OFF”, or you have approached them incorrectly and turned them “OFF”... or prospects that actually turn you “OFF” at the thought of even having to call them *again!* But you

keep them on your list cause they are “easy” to call or they might say yes one day. Do yourself a favour! Get them “OFF” your prospect list! Same as you should throw out mouldy leftovers in your fridge. Throw them out! If you honestly think you can scrape the mould off and contact them, then do it! Set an appointment or get them off your list before they morph into an experiment in career ending frustration!

But again, don’t contact your “leads” yet. Wait till the next chapter. For now, we are just cleaning out the fridge and “restocking it with *fresh* food”. Doesn’t just the thought of that make you *feel* better?

5. If you have an old *Yellow Pages* phone book, open it up to the beginning. (Or go online to “Prospect Memory Jogger - Comcast.net) I mean NOW. Go get the *Yellow Pages* out or pull up the Memory Jogger website! Do it! Start writing down all names that come to mind as you glance through the headings: Accountants (what about yours?), Aircraft (know anybody who works at an airport?), Auto body repair (who fixed your last fender bender?), Barber, Beauty Salons (your hairdresser), Carpet Cleaners (do you plan on getting your carpets cleaned? the cleaners are in your house for a couple of hours...), Car Dealers (who did you buy or lease your last car from?) ...

In fact anyone who you bought something from recently is a potential appointment. If nothing else, they should feel somewhat obligated to return the favour.



Keep going through the *Yellow Pages* headings for 45 minutes to an hour. If you have lived in your area for 2 years or longer I defy you to get past “E” without writing down an additional 25 to 30 names. Try it. Seriously, put this book down and just try it! Keep going through the alphabetical listings until you have 75 to 100 names.

You may not even know their name. Just write down “guy who fixed my car.” “Lady I met at the airport kiosk.” “Gas station convenience store attendant,” etc.

Don’t worry about how to approach them yet. Just keep adding names to your list. Fill it up! Fill your fridge!

Once you have a “full” “refreshed” list, doesn’t that *feel* better? You suddenly have a lot more potential people to call! You actually prospected in the comfort of your own home and it took less than an hour! Please tell yourself: ***I have an unlimited market!*** You’ll never run out of people to call! There’s always more! More babies being born! More kids graduating from high school and college, more people getting married, more people moving into your area, more changing jobs, retiring, and having grandkids!

Once you have a bigger list, you don’t feel so much of the pressure of using up all your names. Even if you screw up the first couple calls, who cares?! You have dozens and dozens more to call! And you will get better at setting appointments! Even if you’re lousy at it to

begin with, I guarantee someone will surprise you and say, “Sure, I’d love to get together and chat with you.”

I will also guarantee this: No calls = No appointments.

6. “Don’t go prospecting – prospect as you go.”

The bad news about not having any appointments is, well, you don’t have any appointments. But the good news is, not having any appointments gives you time to “Prospect as you go.” What do I mean by that? Without a lot of appointments to take up your day or evening, you are free to go and do things that you enjoy and even meet people that enjoy the same things you do! Hello! New friends? Even if they are complete strangers, people that like the same things you do have something in common with you! They instantly qualify as “cool” market contacts. All you have to do is warm them up to warm market contacts.

How to do that is explained in the next chapter.

3

Warming Up the Cool Market

The Art of Turning Strangers into Prospects

During Christmas break after my first semester of Aviation College, I opened a letter from the department head notifying me that **I was on probation.**

What!?

How could that be?! I had been one of only 27 applicants out of 400 to be accepted into this program and now they were telling me I was on probation after one semester?! What for?!

“Mr. Andruschak, your 1st term mark in Calculus is a C-. In order to continue in the Aviation program you must maintain a C+ average. If you do not bring your grade in Calculus up to a C+ by the end of the next term, you will have to withdraw from the Aviation program.”

I was devastated! I started to see all my dreams of becoming an airline pilot slip away. No flying big jets to exotic places in the world, no six-figure salary with lots of time off, no cool uniform, no cute flight attendants! What the heck! All because I got a C- in Calculus?! What does that have to do with flying, for crying out loud?!

I didn't think Calculus mattered as much as my flying courses so I hadn't developed the attention to detail that the calculations required which caused me to make dumb mistakes and do poorly on tests. Besides that, I kept telling myself that I hated Math, as most people do. And because I hated it, I avoided spending any real time studying it. Hence my C-, and now probation!

But I had no time for a pity party. I cut my Christmas break short, and headed back to school early to talk to my Calculus prof.

I was grateful that he made the time to meet with me and talk about the love he had for Calculus. He explained how Isaac Newton had discovered it and how it is used to help understand the laws of the universe, and economics of countries, and science of life. I was in awe. It was then I committed to start at least to "like Calculus" and spend time every day studying it. By the end of the next semester, my mark went from C- to a B+! I really did develop a "love" for Calculus that I still have today.

I believe **Prospecting and Setting Appointments is a lot like the "Math" of a salesperson's career.**

Very few of us are good at it, and even fewer really enjoy doing it. Therefore, most of us never spend the necessary time every

About the Author

Barry Andruschak was born and raised in Vancouver, BC. He has a diploma of Aviation Technology from Selkirk College in Castlegar, BC. After being a charter pilot for 3 years, he was introduced to the A.L. Williams Corporation, now called Primerica Financial Services Ltd., in 1985. He became Primerica Canada's first Regional Vice President independent sales agent in 1986. He currently holds the title of National Sales Director and lives in Victoria, BC with his family.

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