From Email to Sales Meeting in 60 Seconds or Less

13 proven ways to shorten the distance from lead to conversation with online appointment scheduling
The Daunting New Sales and Marketing Realities

Meetings with prospective customers are the fuel that makes the marketing and sales machine run. But getting on a prospect’s calendar is no easy task. It can take weeks to make it happen – and many times, it doesn’t happen at all.

**The results?** You know them well.

Salespeople spend more time chasing prospects and less time talking to them. Sales cycles are longer. Marketing conversion rates are lower.

It can take as many as 8-12 tries before a salesperson can actually speak to a prospect. Can you really afford to spend all this time just to get a prospect on the phone? After all, you’ve got a quota to make!

*How can you overcome these challenges and get quality leads through the funnel faster, increase your sales team’s efficiency, and meet your revenue goals?*

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*The Calendar Invite Battleship*

“Trying to book an appointment between two busy people over email is like playing ‘Calendar Invite Battleship.’ Hoping to blindly hit one of the few open time slots in each other’s schedules is a massive waste of time on both ends. Not fun either!”

Justin Shepard  
Sales Development, ByAll Accounts
The New Rules of Customer Engagement

To move the sales cycle forward and engage your prospects in a meaningful conversation, you need to carve out a time on their calendar.

For them to be interested to talk with you, you’ve got to have a compelling offer and an outstanding pitch.

But let’s be real. With all the competing demands on your customer’s time and attention, these alone will not get you the meeting today. If it’s not super easy for the customer to connect with you, it’s just not going to happen.

Online appointment scheduling allows you to shatter the “I’m too busy” barrier.

Embedding a Click-to-Schedule link or button can transform your email message from just another volley in the ongoing rally of back-and-forth messages into a confirmed appointment on your prospect’s calendar.

The bottom line?
You can dramatically increase the number of your sales engagements and shorten the distance from your email to a meaningful conversation with your prospect or customer.

A Game-Changing Idea

“TimeTrade has transformed our lead generation process. We no longer use cold calling.
Our salespeople are working now on 25-35% more demos and deals.
70% of our new accounts have had at least one meeting scheduled through TimeTrade.”

Dick Orlando
EVP Sales and Marketing, Biscom

Breaking down the wall between marketing and sales
Online appointment scheduling also breaks down the barriers along the marketing and sales cycle. Instead of throwing leads over the wall for follow up, marketing use marketing automation campaigns to deliver meetings with qualified prospects directly to the salespeople’s calendars. Now that’s something that will make salespeople smile!
From Email to Sales Meeting in 60 Seconds or Less

How does it work?
A quick introduction to online appointment scheduling

When a sales rep includes a Click-to-Schedule link in their outbound emails, prospects can view the rep’s available meeting times and immediately schedule a convenient time for a call or demo.

Email confirmations of the mutually agreed meeting time are automatically scheduled and the appointments are added to the personal calendars of all participants — whether they use Microsoft Outlook, Google Calendar, iCal, or Salesforce.com calendars.

**Step 1:** Send an email with your “click-to-schedule” link

**Step 2:** Recipient picks from available times

**Step 3:** The meeting is confirmed

**Step 4:** It is added to your calendar
13 best practices for using email to get on your customer’s calendar today

<table>
<thead>
<tr>
<th>Best Practices at a Glance</th>
<th>Sales</th>
<th>Marketing</th>
<th>Sales Ops</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. When they’re cold, warm them up with your content first</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2. Don’t let the hot leads go cold</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>3. Make it easy to say “Yes!”</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>4. Show them it’s about their time, not yours</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>5. Word your call to action in clear and simple terms</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>6. Make your offer stand out</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>7. Make it personal</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>8. Go for the email + voicemail two-punch</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>9. Use it to say “I am here for you”</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>10. Get sales meetings booked while you sleep</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>11. Listen to the customer’s “electronic body signals”</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>12. Make online scheduling a no-brainer for your salespeople</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>13. Test, Test, Test</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
1. **When they’re cold, warm them up with your content first.**

We are all eager to shorten the distance to the customer’s calendar. With that said, asking for a date before you have properly introduced yourself could be an immediate turnoff. If you are trying to engage “top of funnel” leads that are not familiar with your company yet, warm them up with introductory content before asking for a one-on-one conversation. Give them a reason to want to talk to you first.

For example, thought-leadership pieces that position your company as an expert in your field make for great introductory content, as do case studies. After all, everybody wants to emulate the success of the leaders in their field!

2. **Don’t let the hot leads go cold.**

Once the initial interest has been created, strike while the iron is still hot. Following up on customer action within 24 hours dramatically increases the probability of getting the prospect to respond.

If you are in sales, adding the Click-to-Schedule link to your follow-up email will help you quickly identify the hottest leads and convert them into immediate sales conversations.

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**How Can Marketing Help**

To ensure a timely follow-up, marketing can create auto-response templates that are sent when a lead responds to an outbound campaign or registers on your website. Including a Click-to-Schedule call to action in these auto-response emails is the quickest way to transform the initial interest into a direct, one-on-one customer conversation.

Even if the first email doesn’t lead immediately to a meeting, continue to include the Click-to-Schedule offer in your nurturing emails, so when the time is right, the interest is captured right then and there.
3 Make it easy to say “Yes!”

A Click-to-Schedule button or link in your email makes it easy for your prospect to take the next step, knowing they can bypass the annoying and time-consuming ritual of back-and-forth email and phone messages just to find a time slot that would be convenient for both of you.

It’s all about making it super easy for the customer to say yes to a meeting, so be mindful of how busy they are. You may want to experiment with different meeting durations, but a 15-minute introductory call seems to be the magic formula that many companies find yielding the best response.

4. Show them it’s about their time, not yours.

The language you use when asking for your prospect’s time can make a profound difference on how they perceive it.

Saying “Click here to find an open slot on my calendar” puts you in the center. Saying “Click here to find a time that works best for your schedule” communicates that you care about the prospect’s time. It’s a subtle change, yet one that can increase the probability of response. Consideration goes a long way.

“TimeTrade facilitates a new purposeful way for us to talk to people when it is convenient for them.”

Perry Allison, VP Marketing, Bidding for Good
5. **Word your call to action in clear and simple terms.**

A clear call to action will increase the number of meetings you get from your email. Use plain and simple words that make it easy for the customer to take action. It is very possible the people you are emailing are not familiar with online scheduling. You have the opportunity to give them an idea of what to expect when they click on your link.

**Here are a couple of examples:**

To schedule an introductory call now, simply [click here](#). A calendar with my available time will appear. You can [choose a day and time that works best for you](#), and I will call you then.

Getting your personalized demo is as easy as 1-2-3:

1. Click the "Schedule a Demo" button below
2. Choose a date and time that works best for you on my calendar
3. I will call you at the day and time you have selected to walk through the demo.

[Schedule a Demo](#)
6. **Location. Location. Location: Make your offer stand out.**

Don't bury your Click-to-Schedule call to action in the middle of a busy email. Here are four proven placement ideas you can use to make your offer visible.

**Marketing emails**

- **a)** When using the Click-to-Schedule as the primary call to action in a marketing email, position it in a callout box that draws the most attention to it.
- **b)** When using it as a secondary call to action, carve out a clear section with the Click-to-Schedule button or link at the end of the email.

**Sales emails**

- **c)** In a sales email, you can grab the attention of the reader by keeping your intro brief and including the request early in the email.

Dear John,

I understand you have viewed our online demo. Can we schedule a 15-minute call with our product expert to make sure you have the information you need?

To schedule a call at a time that works best for you, [click here](#) to select a day and time on the calendar. I will call you at that time with one of our experts on the line.

- **d)** Another strategy that works really well for sales emails is placing the Click-to-Schedule link in the P.S. line.

Dear John,

In case you haven’t heard, I wanted to share with you some exciting news: we just won the “Product of the Year” award!

You can read more about it [here](#).

Sincerely,

Josh Brown, Account Manager

P.S. We have some great year-end offers you may want to take advantage of. If you are interested in learning more, simply [click here](#) to schedule a 15-minute call at a time that works best for you.
Best Practices in Action:
Click-to-Schedule Doubles Sales Rep Productivity at ByAllAccounts

ByAllAccounts’ innovative software enables financial advisors to better serve their high net-worth clients by aggregating data from disparate accounts into a single web-based interface.

“Wealth management is based on trust,” says Cynthia Stephens, VP of Marketing at ByAllAccounts. “To win the trust of prospects, we go above and beyond to talk with our customers to better understand their needs.”

Unfortunately, getting customers on these sales calls was a time-consuming process for the salespeople. Justin Shepard, Sales Development Rep, describes trying to book an appointment between two busy people over email as ‘Calendar Invite Battleship’: “Sending and declining time proposals through back-and-forth emails, hoping to blindly hit one of the few open time slots in each other’s schedules, is a massive waste of time on both ends. Not fun either!”

To drive up the number of one-on-one conversations, outbound marketing email campaigns offering educational material now include a “Click to Talk to a Rep” link. Additionally, the email signatures of all ByAllAccounts sales reps include a link to their personal TimeTrade calendar—prompting those they’ve corresponded with to book an appointment.

Shepard sums it up: “Now when prospects self-schedule an appointment with me, I’m fulfilling a request to meet on their terms. I’m creating twice the number of opportunities per day than I did before.”

“I’m creating twice the number of opportunities per day than I did before.”

Justin Shepard
Sales Development Rep, ByAllAccount
7. **Make it personal.**

People buy from people they like. They want to have a conversation with a person, not an organization. It is no surprise that emails that come across as personal get better response rates.

Including a personal introduction page in your Click-to-Schedule offer is a way to infuse your email with an added personal touch. It could be the difference that makes the customer more inclined to take the relationships to the next step.

Feel free to get creative with your personal introduction page. You can show your picture, describe your background, and other relevant tidbits, or even include a link to your own video message!

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**How Can Marketing Help**

Marketing can send personalized emails on behalf of the sales team that include each rep's unique Click-to-Schedule link. Prospects can schedule directly with their dedicated account representative right from a marketing email.

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8. **Go for the email + voicemail two-punch.**

Most salespeople find voicemail ineffective. Many avoid leaving voice mail messages altogether, knowing that most prospects will not return these calls.

However, when combined with a Click-to-Schedule email, voicemail can be very effective. TimeTrade’s customers find that leaving a voicemail message that alerts the prospect to expect an email with a link to a calendar dramatically increases open, click-through and schedule rates.
9. **Use it to say “I am here for you”**.

Online appointment scheduling also provides salespeople with an opportunity to strengthen and personalize their relationships with prospects and customers.

As a salesperson, including a Click-to-Schedule link in your email signature communicates you are there to help and accessible.

**Try this language for your email signature:**

> If there is anything I can help you with, just book a time on my calendar that works best for you.

10. **Get sales meetings booked while you sleep.**

Not only does online scheduling work to schedule sales meeting during the day, it can also do the work for you while you are out of the office.

Simply add the Click-to-Schedule link to your default “Out of Office” message, and turn it on before the end of the workday (or when you go on vacation) and give late night emailers a way to access your calendar immediately. Seeing new meetings the next morning already scheduled in your calendar will wake you up quicker than a double espresso!

**Bonus Tip: End-of-day lead cleanup**

Responding to each incoming inquiry within 24 hours is a best practice that most sales departments follow, but even with the best intentions, sometimes sales just cannot keep up with all these inquiries. A rep may be out for the day, tied up with a real hot prospect, or marketing launched a great campaign and there are just too many of leads to keep up with (what a great problem to have)!

To ensure that no inquiries are left unanswered overnight, create a rule in your CRM or marketing automation system that automatically sends an email on behalf of the rep to those that have not been contacted by the end of each day. Include the Click-to-Schedule link in this email to keep the ball moving with prospects that are ready for the next step, and they will show up on your reps’ calendars when they come in the next day!
11. **Listen to the customer’s “electronic body signals.”**

Actions speak louder than words. When a prospect clicks on a Click-to-Schedule link in your email, it means they are ready to talk business. If you are using lead scoring, this is the kind of signal you are looking for to bump the prospect up in the ranking.

The opposite could also be true. Most prospects will not say no. They simply don’t respond. After offering a prospect several opportunities to schedule a meeting without any positive response, it probably means they are not ready yet. Offer them something else instead—an ebook, video, etc.—then try again after they showed more interest.

12. **Make online scheduling a no-brainer for your salespeople.**

Online appointment scheduling can be a game-changer for your sales and sales development teams. And although the solution is simple to set up, salespeople can use some help optimizing it to maximize the benefits they get.

**Here are a few things you can do:**

- Integrate with Microsoft Outlook, Salesforce.com and your marketing automation system to make Click-to-Schedule available everywhere salespeople may use to send email
- Create different types of TimeTrade appointments types that salespeople can include in their emails; also give them the freedom to create their own appointment types
- Embed Click-to-Schedule links and buttons in ready-made CRM and marketing automation templates that sales can use in any of these systems

Commonly used appointment types you can redefine for your salespeople:

- 15-minute introductory call
- 20-minute demo
- 30-minute product review
13. Test, test, test.

Click-to-Schedule is a versatile tool in your arsenal. We have assembled some of the best practices that have helped other sales and marketing professionals use this tool to successfully combat elongated sales cycles.

As you begin to use online appointment scheduling, you might find that what works best for you with your customers is different from what we have seen so far. You may chart a new territory!

To make the most out of online scheduling in your email communication, keep experimenting, measuring results, and optimizing the way you use it.

THE TOP TEST LIST

- Button vs. link
- Wording on button/link
- Placement in the email
- Meeting duration
- Single vs. multiple calls to action
- Use an intro page or go directly to calendar
One of the original developers of computer-based fax, Biscom is today a leading provider of enterprise document delivery solutions that include cloud-fax services and enterprise security software. However, when it came to generating prospective new account leads for Biscom’s sales teams, their process was missing the mark.

“Our sales reps were obtaining appointments through traditional cold calling and standard email marketing campaigns that required prospects to call us if they were interested,” recalls Biscom’s EVP of Sales and Marketing Dick Orlando. “These techniques delivered only 75-100 unqualified sales appointments per month and upwards of 40% no-shows. We had to do something to eliminate our open calendars.”

Orlando discovered TimeTrade, an online appointment scheduling solution that is simple to use and affordable. By embedding a “Schedule Now” button in a rep’s outgoing emails, prospects click to access the salesperson’s Outlook calendar and schedule time for a demo.

“TimeTrade has transformed our lead generation process. We no longer spend time cold calling unqualified prospects. As a result, missed appointments have dropped 75%, and three times as many qualified prospects are contacting us to learn about our solutions. Qualified leads, product demonstrations and revenue have all increased.”

“TimeTrade has become indispensable for our sales personnel.”

“We had to do something to eliminate our open calendars.”

By embedding a “Schedule Now” button in a rep’s outgoing emails, prospects click to access the salesperson’s Outlook calendar and schedule time for a demo.

“Three times as many qualified prospects are contacting us to learn about our solutions.”

Dick Orlando
Executive Vice President, Biscom
In Conclusion

Engaging prospects in a conversation and moving the sales process forward is not getting easier.

Sales reps can use any help they can get in the battle for the customer’s time and attention. Online Appointment Scheduling transforms your email communication into a competitive weapon in this battle.

With smart use of Click-to-Schedule links in your sales and marketing emails, you make it easier for your sales reps to –

- Connect with more qualified prospects on any given day
- Eliminate the time wasted on trying to “catch” the prospect
- Surface the most qualified leads to the top of the queue
- Accelerate the sales cycle

The bottom-line is more dollars in your top-line: Companies that use TimeTrade’s Click-to-Schedule capabilities have been able to increase sales bookings by as much as 30%.

To see it in action and explore how Click-to-Schedule can help your organization achieve similar results, schedule a 15-minute demo with a TimeTrade’s expert. Visit www.timetrade.com/schedule to arrange a time for your demo.
About TimeTrade

**TimeTrade: Enterprise-Class Online Appointment Scheduling**

TimeTrade is the world leader in online appointment scheduling systems used by businesses to create new customers, accelerate the sales and service process and make it easy and fast to respond to customers—24/7. Our scheduling software solutions are built on the flexible TimeTrade Appointment Cloud SaaS platform that has the power to scale up to meet the real-time scheduling demands of the largest deployments.

Appointments are critical to any business and having the time for face-to-face or phone-based interactions is a must in order to maximize customer satisfaction and accelerate the sales process. TimeTrade’s appointment scheduling solutions are perfect for sales prospecting, web-based lead generation, post-sales support, marketing effectiveness, and streamlined customer service delivery. They provide the capability for B2B and B2C businesses to spend more time with customers and prospects by eliminating the time-consuming process of creating, coordinating and confirming appointments.

To learn more about TimeTrade, visit [www.timetrade.com](http://www.timetrade.com).