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8 Appointment Optimization Tips



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Now that you have a one-on-one appointment with a prospect it's time to close the deal. Listed below are some tips to help you do just that.



Preparation

- 1.** Find out what information the prospect is looking to go over during this appointment, then focus on that topic. Then, ask yourself what message you want this prospect to walk away with.
- 2.** Your presentation matters to prospects. Wear a professional suit and look sharp. This will make you seem prepared and confident.
- 3.** Take notes during the appointment to give the impression you believe that the conversation is very important.



During The Appointment

4. Make lots of eye contact to show that you are engaged and confident.
5. Listen to the prospect! Being a good listener portrays that you are interested. It also allows you to know the prospect better.
6. Pay attention to the prospects' verbal and non-verbal feedback. Are they interested, bored, or even annoyed?
7. Make sure that you phrase everything in layman's terms. Most prospects will not understand all of the financial jargon you use.
8. Ensure that the prospect leaves the appointment with clear and valuable takeaways.



Get in Touch

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