The small business guide to managing appointments

keap

Table of Contents

keap

You got the lead, now it's time to meet

It's no secret that the most challenging part of starting and growing a service-based business is finding clients. But the challenge doesn't stop there, does it?
After you've gone through the work of gaining a sales lead's attention, the next step is setting up some time to meet and hope they show up or don't cancel on you at the last minute.

Cancellations and no-shows are expected, but as a business owner, you can't help feeling frustrated after you scheduled a time you thought worked for everyone, prepared for the first meeting, and then had to reschedule the appointment. Not the most productive use of your time, that's for sure.
Service-based businesses depend on a continuous flow of appointments with new sales leads, but business owners shouldn't have to live with a stressful scheduling process. With the right tool and strategy in place, business owners like yourself can create an appointment scheduling process that's simple and makes life easier for you and your sales leads and clients.

In this guide, we'll share tips and strategies you can incorporate into your appointment scheduling process to help you:

- Reduce appointment no-shows and cancellations
- Save time and reduce stress throughout the appointment scheduling process
- Follow-up the right way after the first meeting

Take control of your calendar

The expectations you set and the boundaries you enforce early on will ensure that you (and your customer) get the most out of those hours.

After a couple weeks of back-and-forth texting, emailing, and calling (if you're in an industry that still uses the phone), you finally get the first meeting with a sales lead.

The meeting day arrives, you've taken the time to prepare, and you're ready to go. It's time for the meeting. You arrive at the location—video, conference call, or in-person—either way, you're there, on time, as promised.

You wait.

Ten minutes in and you're still waiting. You decide to give them the benefit of doubt—they must be stuck in traffic, they're running behind and will show up any minute, they're having technical issues connecting to your video call—and stick around a few more minutes. The considerate 15-minute rule has now passed, and your patience is beyond wearing thin at this point.

Sound familiar? No-shows and cancellations happen for many reasons. But don't let that discourage your efforts to win new business. You'll overcome the productivity and emotional drain of no-shows and cancellations and take back control of your calendar when you know the warning signs so you can proactively prevent them from happening.

No-show and cancellation warning signs:

Forgetfulness: Sometimes people simply forget about the appointment.

Low priority: Often, it's a question of priorities and choosing between attending a meeting or attending a personal event, like a child's soccer game.

Finances: Finances can be a significant factor for a lot of people. Some people may end up in a difficult financial situation after they've scheduled an appointment.

Frustration with progress: If a client feels like they're not making progress, they can quickly become frustrated, give up, or stop showing up. For example:

- They're not getting the quick weight-loss results they hoped for when they started a weight loss program.
- The skin-care regimen isn't getting rid of wrinkles the way they hoped it would.
- The commitment to their personalized fitness plan keeps dropping on their priority list.

Lack of transportation: In some cases, a person may not have reliable transportation, or they rely on someone else to provide transportation.

Bad experience: If a client had a bad experience, like a long wait time or dissatisfaction with the service they received, they're more likely to not show up for their next appointment.

Embarrassment: They don't live up to their end of the bargain, so they're more likely to not show up.

Here are a few examples:

Type of appointment	Reason for no-show or cancellation
Quarterly review with their financial planner	They didn't prepare the necessary documents for the meeting
Weight loss program follow-up visit	They didn't enter their food and exercise in a daily journal like they said they would
Dental check-up and cleaning	They haven't flossed their teeth in years!

Be on the lookout for these warning signs so you can stop them in their tracks before they become a barrier that's draining you and your business.

How to prevent no-shows and cancellations:

Know the type of people who fit the "no-show persona"
Unengaged sales lead:

- People who stop engaging or lose interest during the sales process, but they're not making it obvious.
- Engaged sales lead: People who are engaged, but they're busy juggling a lot of commitments.

Schedule meetings that add value

Avoid scheduling a vague "checking-in" meeting with sales leads and clients. Tell them what the meeting is about, why the meeting is important, and give them a reason to show up.

Send a pre-meeting confirmation request
Even if you booked a valuable meeting with a sales lead, they get busy, or priorities change, so it's good to send a friendly reminder email or text a day or two before. Let them know you're looking forward to meeting with them and ask them to confirm or reschedule if they can't make it.

Have a no-show follow-up process

You're likely to run into a no-show or cancellation now and then, but don't let it get you down. Instead, have a follow-up process in place to let them know you waited for them, but you understand they were probably busy and you'd like to find a new time to meet. A time-saving, effective way to go about this is to set up a series of automated follow-up emails to reschedule the appointment.

Remember, you're in control

When you pay attention to the warning signs and take a proactive approach to prevent cancellations and no-shows, you'll close more sales deals and speed up your sales process. Ignoring no-shows and cancellations, or letting them get in your way, will only hurt your business in the long run.

Schedule smart

As a small business owner, you know scheduling appointments can quickly eat away valuable time you don't have to spare. By now, most small businesses have switched over from paper calendars to online calendars, like Google Calendar.

However, some small businesses still use paper calendars (17 percent still do), if you're one of those businesses, ask yourself:

1. Why am I still using this method?
2. Why haven't I started using an online calendar that syncs up with appointment scheduling software?

You may (or maybe not) be surprised to know how much you're missing out on. According to a study conducted by Software Advice, combined, 61 percent of small businesses use appointment scheduling software that syncs with their online calendar experience **faster**, **simpler**, and **more accurate** scheduling.

Everyone benefits

The benefits don't stop there. With scheduling tools like Keap, everyone benefits. Your business will benefit and so will your sales leads and clients.

The top benefits of using appointment scheduling software

Say goodbye to the back-and-forth

Not just for you, but for your sales leads and clients, too. Using an online calendar allows people to see your availability, choose a time that works best for them—and you, and quickly schedule a time to meet. You'll receive a notification whenever an appointment is scheduled or changed. That way you're eliminating the back-and-forth, automatically staying up to date with everything on your calendar, and reducing the possibility of a no-show or cancellation.

70% of businesses that use scheduling software experience significant benefits, including easier and quicker scheduling.

Increase visibility, reduce mix-ups

Using an online calendar and appointment scheduling software provides a central place where everyone who needs to access the calendar—you, your team, sales leads, and clients—can easily see available appointment times, quickly schedule a time to meet, and reschedule or cancel an appointment. Plus, information syncs in real-time and stays organized, so you don't have to worry about costly, embarrassing scheduling mix-ups like double-booking or confusion when you're trying to schedule a meeting with someone in a different time zone.

Providing sales leads and clients with the convenience and flexibility they demand not only eliminates the back-and-forth that wastes everyone's time, but it shows them you're going the above and beyond to provide a personalized experience.

26% of businesses who use appointment scheduling software make fewer mistakes.

Access your calendar anywhere, anytime

From your laptop, tablet, or mobile phone, your calendar is with you wherever you go. You can check your calendar between meetings, quickly access details and information about the meeting location and the person you're meeting so you're always prepared and never caught off guard when you're meeting.

22% experience increased calendar visibility.

Boost productivity, win more business

Without a doubt, removing the manual work and repetitive, time-consuming administrative scheduling tasks from your day will free up your time. And when it comes to running a business, time is money! You can save three to four hours a week—almost half a day each week. You can use some of that time to prepare for an upcoming meeting, so you're confident and ready to go when it's time to meet.

Tip: Send any paperwork you need to the person you're meeting with to complete before you meet. Additionally, send an email or text reminder a couple days before the meeting, so they don't forget to come prepared. Another excellent opportunity to show them you're going above and beyond to make sure you have enough time to focus on them before you meet, not the paperwork. It's a win-win for everyone!

Put your best foot forward—always!

After meeting with sales leads and clients, and doing your best to win their business, it's even more important now to keep them interested and engaged.
While it's important to stay connected throughout the client journey, following up after the first meeting is crucial to developing a good relationship and improving the likelihood of converting a sales lead to a client.

When's the best time to follow up after the first meeting?

Right away.

How?

With a personalized email.

The right way to follow up after the first meeting

Here are some step-by-step tips to help you follow up the right way:

Step 1: Send a follow-up email

Right: Immediately after the first meeting, send an email which recaps your conversation and provides additional information about your discussion to continue building trust and showing them you care about their specific needs. Include arrangements for the next appointment or set it up if you talked about meeting again, and ask open-ended questions so they're more likely to respond to your email.

Wrong: Send a generic "just following up …" email or sales-y "Just sign on the dotted line …" email.

Step 2: Send a quote (if you discussed pricing)

Right: Send a quote within 24 hours. If you're talking to someone who's ready to move forward right away, they'll want pricing information from you ASAP. Most likely, they're shopping around and the business which is most responsive and competitive is the one who'll win their business.

Wrong: Wait a few days to send a quote. By that time, there's a good chance you've missed your opportunity.

Step 3: Take a deep breath and wait, but not too long

Right: If you don't hear back after your first follow-up email or email and quote, wait at least 48 hours before you reach out again. If they don't respond, reach out with another email reminding them you reached out before and highlight the value your product or service offers. Provide your contact information and let them know you're available to answer any questions.

Wrong: Not giving them enough time before you respond. People get busy and may not be able to respond right away. The last thing you want to do is come on too strong and miss out on converting a sales lead who may be on the verge of conversion.

Step 4: Give it another 48 hours and reach out again if they haven't responded

Right: In this email, politely reiterate that you've tried to reach them twice, offer a bit more helpful information—additional facts about your product or service, discounts or promotions for first-time clients, or testimonials or reviews from clients. Outline the benefits of your product or service in more detail, and make it clear you're available to answer any questions in person, by email, or phone—whatever's the most convenient for them.

Wrong: Sending an email too soon that makes it obvious you're irritated they haven't responded. This will send them running to your competition.

Step 5: Know when it's time to move on

Right: At this point, consider sending a "break-up" email. Let them know you've tried to get in touch with them a few times, you understand it may not be a good time to connect, and you don't want to bother them if your product or service isn't a fit. Surprisingly, this may be the email that gets them to respond.

Wrong: Continue to bother them with emails they'll ignore, or worse, mark as spam.

Follow up without falling behind

A step-by-step follow-up process like this is possible, even for a busy small business owner like yourself. There are many email automation and client relationship management (CRM) tools available in the market to help you streamline your follow-up process and create personalized email messages tailored to the changing needs of your sales leads and clients.

However, you probably already have a handful of tools you use to run your business, and you're doing everything you can to avoid adding another tool, another password to remember, another place to enter client information, and the cost of another monthly subscription.

We get it. In fact, we recommend reducing the number of tools you use to run your business to help you save time, reduce stress, increase productivity, and win more business.

Tools like Keap, designed specifically for small businesses, bring all your workflows together in one place. From generating sales leads, storing lead and client information, scheduling and managing appointments, sending personalized follow-up emails, to sending invoices and processing payments. Keap brings it all together in one place.

Bring it in for the win

Bringing in new business requires ongoing patience and personalized nurturing. But with the right attitude, a proactive approach, and the right tool to help you run your business efficiently, you can simplify and strengthen your entire sales process from generating leads to maintaining a book of loyal clients.

While the occasional no-shows and cancellations are inevitable, especially when you're meeting with sales leads for the first time, the information we shared with you in this guide will help you:

- Create a scheduling process that's simple and convenient
- Recognize the warning signs early on so you can take action and avoid missing an opportunity to convert a sales lead to a client
- Follow-up the right way after the first meeting so you can keep sales lead engaged and create an experience that brings home the win

Did you like this guide? Read more!

Explore our Business Success Blog for more sales and marketing articles, guides, webinars, and other resources that can help your small business grow and thrive. Want to talk to a small business consultant?

Visit keap.com or call **+1 (866) 800-0004**