

WAYMAKERS

Appointment Setting Quiz

Phone-to-Zoom Fundamentals

Name: _____ Date: _____

1. When should you discuss the products and services of our business?

- a. During the initial phone call
- b. Through a long text or Messenger conversation
- c. During a scheduled Zoom appointment
- d. Any of the above

2. What is an appointment?

A specific _____, _____ and _____ to give someone a presentation about our _____ and _____ or _____.

3. An appointment is NOT:

- a. I'm going to see someone at church
- b. Catching up with a friend on FaceTime
- c. Saying, 'Follow up with me next week and we'll set something up'
- d. All of the above

4. An appointment is a specific time, date and Zoom meeting to give someone:

- a. A presentation
- b. Information
- c. A life insurance quote
- d. All of the above

5. Through which medium should you normally set an appointment?

- a. A phone call
- b. A voice message
- c. Text message only, as long as the person is a close friend or relative
- d. Any method works equally well

6. If you follow the WayMakers appointment-setting script, what percentage of qualified contacts should you expect to set?

- a. 50%
- b. 50–60%
- c. 75–85%
- d. 100%

7. If you are not setting the expected percentage of appointments, the most likely reason is:

- a. You are not consistently following the system
- b. You are contacting the wrong people
- c. Everyone is too busy
- d. Everyone is already set

8. A professional learns which of the following?

- a. The script verbatim
- b. Tonality
- c. Emphasis
- d. All of the above

9. It is our responsibility to become:

- a. Good at appointment setting
- b. A good salesperson
- c. Great at appointment setting
- d. Too legit to quit

10. Over the phone, you can control the:

- a. Pace, tone and atmosphere
- b. Time, platform and date
- c. Pace, atmosphere and time
- d. Tone, date and atmosphere

11. Why is it important to use the WayMakers system to set the Zoom appointment?

- a. Casual in-person conversations can easily get off track
- b. Text conversations can stall or be misunderstood
- c. A phone call allows you to guide the conversation and secure a specific Zoom time
- d. All of the above

12. What are the five qualifiers for an appointment?

M _____

A _____

C _____

H _____

O _____

13. What are the two basic types of appointments?

1) _____

2) _____

14. If the prospect is four or five points, which type of Zoom appointment do you set?

15. But what if the person would also be a good recruit?

- a. Set a recruiting appointment
- b. Recruit on the back end
- c. Either approach should work
- d. It depends on whether the spouse can join the Zoom

16. Which two qualifiers automatically cause the appointment to become a KT?

_____ and _____

17. The biggest issue with not setting appointments is failing to follow the:

18. How many times should you listen to the WayMakers appointment-setting audio?

- a. 5–10 times
- b. Until you can consistently set appointments
- c. 50–100 times
- d. There is no need to listen once you know the basics

19. The better you learn the script, the better you will be able to _____ your people—and the better _____ you will get.

20. What should you do if the script does not sound like your normal conversation?

- a. Create a new script; the exact words are not important
- b. Learn the script and deliver it with your own natural tonality
- c. Start sending text messages instead
- d. Decide the business must not be for you

21. What are the component pieces of an appointment-setting phone call?

- a. Small talk
- b. Transition
- c. Body
- d. Close
- e. Post-close
- f. All of the above

22. How long should small talk last?

- a. 10–15 seconds maximum
- b. About 30 seconds
- c. Roughly one minute
- d. About eight minutes

23. What is another name for a transition?

- a. There isn't one
- b. Connector
- c. Linker
- d. Binder

24. Put the appointment-setting phone call in the correct order.

A. Linker B. Post-close C. Small talk D. Body E. Close

Correct order: _____

25. How long should an appointment-setting phone call last?

- a. No more than five minutes
- b. Two minutes or less
- c. As long as it takes to set the appointment
- d. There is no standard

26. If you give someone too much information before the Zoom appointment, what are they in danger of experiencing?

- a. Becoming too informed
- b. Analysis paralysis
- c. Information overload
- d. Brain freeze

27. What is the WayMakers script transition?

- a. 'Anyway...'
- b. 'Listen, the reason I'm calling...'
- c. 'Did I tell you about my new job?'
- d. 'Who handles your life insurance, by the way?'

28. Finish the sentence: 'I just want to set a time to...'

- a. Do your life insurance
- b. Show you a presentation
- c. Pop on Zoom
- d. Stop by your house

29. Which phrases should you avoid?

- a. 'I was wondering...'
- b. 'Would it be okay...'
- c. Both A and B
- d. Nothing is off limits as long as you set the appointment