

BONUS MODULE #2

Hiring Proven V/A's, Appointment Setters & Sales Reps So You Can Free Up Your Time & SCALE!



Welcome to Mastery Bonus Module #1 of the **Client Acquisition Accelerator**.

(Hiring Proven V/A's, Appointment Setters & Sales Reps So You Can Free Up Your Time!)

The Goal of This Special Module Is To Hand You The Proven Blueprint To Scale From 6-Figures To 7-Figures & Beyond By Hiring V/A's, Appointment Setters & Sales Reps So You Can FREE Up Your Time & Work In Your...

(Z.O.G = Zone of Genius!)

Back when I first grew one of my previous businesses in the high-ticket affiliate marketing niche... I was working 10 - 12 hours per day to build my business.

I had no team members apart from a graphic designer that was working on a project basis for me. I was making some decent money, but it was stressful!

I was a one-man band, and I had no time to work ON my business. Maybe you can relate?

I was literally doing everything on my own including...

- Lead generation
- Driving traffic
- Following up
- Converting sales via email, DM messenger chat and the phone
- Creating content
- I had 10 different product or service offers I was promoting
- Multiple sales funnels
- And things were an absolute mess due to **COMPLEXITY!**

This got me to my first 6-Figures in revenue, but it was a massive **STRUGGLE!**

And I woke up one morning sick to death of working more hours than a 9-5 job on activities and operations that I simply did not enjoy and thought...

“There Has To Be a Better Way of Playing This Online Business Game?”

This is where I came across a training course that taught me ...

How To Leverage OPT = “Other People’s Time”

I purchased the course from a guy who had done \$150M, went through the training... learnt the key components of **HIRING & OUTSOURCING!**

This was where I partnered with a proven phone sales team that did the majority of the selling for me.

I hired my first V.A (*Virtual Assistant*)

And then hired an inbound appointment setter that followed up with leads by calling them on the phone and sending DM’s!

It was an absolute game changer for my business and quite literally the **FASTEST & most EFFORTLESS** skill set to **INSTANT MANIFESTATION** of **PROFITS** once the system is set up and running like a well-oiled machine!

Inside this module I am going to teach you 3 hires you need to make to **SCALE your business** so you can work in your zone of genius while living a life of more **FREEDOM!**

Here's what we're going to cover together...

PHASE #1 - The Lean Multi 7-Figure A-Team Blueprint!

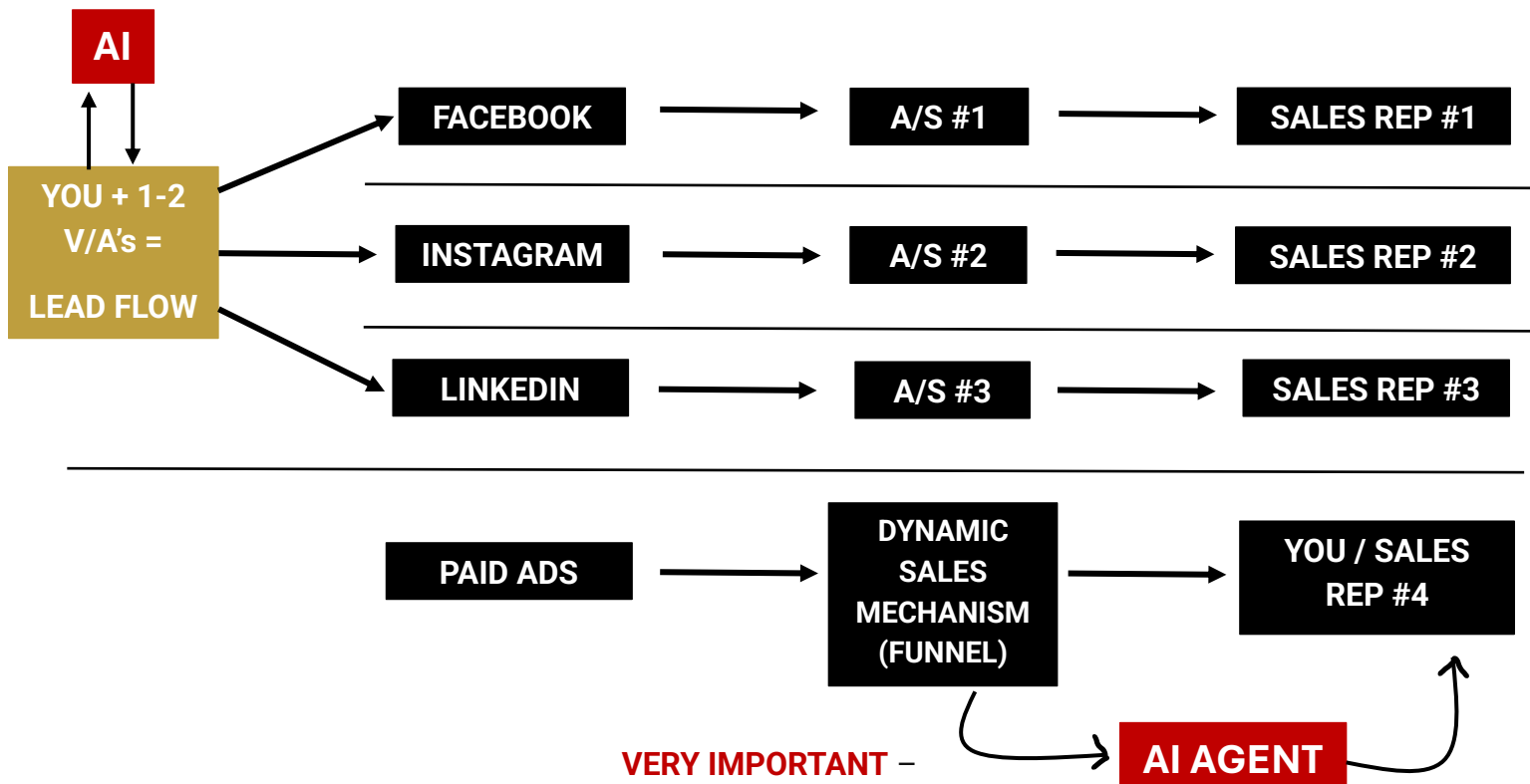
PHASE #2 - Organic Scaling Phase – Hiring V.A's & Appointment Setters + Operations & Management!

PHASE #3 - MCM Scaling - Ramping Up To 1000+ Organic Messages Per Day!

PHASE #4 – Dynamic Sales Team Operation (EXPONENTIAL SCALING PHASE)

Let's begin...

PHASE #1 - The Lean Multi 7-Figure A-Team Blueprint!



Start With ONE Social Media Channel That Your Target Market Is Primarily On, Optimize The Process Yourself, Hire A-Players Then DUPLICATE Onto The Next Social Media Channel If You Desire!

When your (OFFER) is dialled in...

...You can get to 6-Figures with ONE organic social media channel on your own WITHOUT a V.A and a Setter! From \$0 to your first \$100K you are in a phase called the...

Dynamic Offer Iteration Phase!

As soon as you've crossed 6-figures + your offer is optimized, and you've done research + product development (**R&P.D**) by knowing the big problems & solution sets to get your clients the END-RESULT + you understand client objections by taking sales calls then you can start implementing the...

Lean Multi 7-Figure A-Team Blueprint!

You can get to 7-figures with just 1 organic channel (*Facebook, Instagram or LinkedIn*) with a V.A & 1 appointment setter + 1 paid ads channel (*YouTube Ads, Facebook Ads or Insta Ads etc*)

If you leverage all of this with paid traffic + a V.A, 3 organic channels, 3 setters and 3 sales reps you can scale to multi-7-Figures using MCM which stands for **Multi-Channel Marketing**. This is where you have an appointment setter assigned to each of the 3 social media channels doing organic marketing and you are running paid ads to into a dynamic sales mechanism (*FUNNEL*) to SCALE!

But the key here is to MASTER 1 channel yourself, so you know the process like the back of your hand. When you know the process deeply, you can then create a system where a V/A, appointment setter and sales rep can run the system for you.

If you try all 3 at the same time + paid ads WITHOUT mastering 1 at a time, COMPLEXITY will creep in, and you'll struggle to get results.

What I am about to teach you may seem complex at first, but once you've mastered 1 organic social channel yourself and you have hired your V.A + your first Appointment Setter it will be a lot easier to duplicate the whole system with your next channel if that's something you desire!

After hiring your V.A and your first Appointment Setter... Your job will be to continue to sell over the phone, create strategical content and increase lead flow with the help of your V.A!

But to do this your OFFER must be dialled in and the pricing must be on point, which you should have completed by following the C.A.L.V.O Method yourself by gathering enough DATA using statistical relevance to make key decisions and optimize!

The key here is getting enough volume! The volume throughput you can send into your organic system to start with, the FASTER you will have an OFFER that sells effortlessly because you'll gain data and client feedback to optimize the offer as time elapses!

Once the offer is dialled in then you have the opportunity for infinite scale by running paid ads into your sales funnel and the dynamic sales mechanism does the majority of the selling for you, while having your team running the organic channels.

PHASE #2 - Organic Scaling Phase – Hiring \$3/Hour V/A's & A-Player Appointment Setters!

Here's what we're going to cover in this section of the training module

7-Figure Team Hiring Protocol

- ✓ Overview of Hiring & Operational Constraints!
- ✓ Hiring Your First V/A + Appointment Setter On ONE Social Media Channel To Start With!
- ✓ Setting Up Your Communication Channel!

Virtual Assistant Hiring Protocol!

- ✓ When Should You Hire a V/A (*Virtual Assistant*) To Help With Your Organic Lead Flow?
- ✓ What To Look For When Hiring Your First \$3/Hour V.A!
- ✓ Where To Find \$3/Hour V.A's!
- ✓ The V/A D.A.O Method Workflow Kit = SOP's (*Standard Operating Procedures*)
- ✓ Creating Your Database of V.A's!
- ✓ Contacting Your V/A's Using Online Jobs PH
- ✓ The V/A Leveraged Interview Process + Trial!
- ✓ Getting Your V/A Started In The Operations of Your Business!
- ✓ V/A Performance Tracking Review & Firing Protocol

Appointment Setter Hiring Protocol!

- ✓ When Should You Hire An Appointment Setter?
- ✓ What You're Looking For When Hiring An A-Player Appointment Setter!
- ✓ Where To Find A-Player Appointment Setters!
- ✓ The Appointment Setter D.A.O Method Workflow Kit = SOP's (*Standard Operating Procedures*)
- ✓ Creating Your Appointment Setter Job Ad!
- ✓ Creating Your Database of Appointment Setters!
- ✓ The A/S Interview Process, Screening + Trial!
- ✓ Onboarding - Getting Your A/S Started In Your Business!
- ✓ A/S Performance Tracking Report & Firing Protocol!

- ✓ Making Your VA's, Appointments Setters & Sales Reps Feel Part of The Team & Looking After Them!

7-Figure Team Hiring Protocol

Overview of Hiring & Operational Constraints

Hiring a V/A (*Virtual Assistant*) & Appointment Setters and Sales Reps are essential assets in your business as you advance in your entrepreneurial journey and will allow you to scale from 6-Figures to multi-7-Figures when implemented correctly!

I will first walk you through the hiring process of getting your **V.A (Virtual Assistant!)**

I will then show you where and how you can hire **A-Player Appointment Setters!**

And then I will show you how to scale by hiring **Killer Sales Reps!**

After hitting 6-figures by implementing the D.A.O organic system & / or running paid ads, you have hit a major constraint in your organic prospecting & lead flow output due to TIME.

This is where you need to hire a V/A (*Virtual Assistant*) to help with your...

- ✓ Organic **LEAD FLOW!**

The role of your V.A will help you...

- ✓ **Build a database of targeted leads on the social media channel that you have chosen!**
- ✓ **Help you create valuable content for the social media channel you have chosen.**

If you're running paid ads at this point the next constraint, you'll have in this process is booking calls and following up.

This is where you'll hire your first appointment setter to handle the following on ONE social media channel:

- ✓ **Building relationships & trust through DM's (*Direct Messages*)**
- ✓ **Booking discovery calls and strategy calls.**
- ✓ **Following up with qualified leads to book follow up calls on your calendar.**

This will free up your time which means your job will be to create valuable content and close sales over the phone and over the DM's.

You'll give the appointment setter access to your social media account (*Facebook, Instagram or LinkedIn*) using 2 Factor Authentication linked to your phone and they will do the INBOUND prospecting for you to book sales calls on your calendar.

Hiring Your First V/A + Appointment Setter On ONE Social Media Channel To Start With!

If you have gone through module #5 of C.A.A, we talked about FRIEND CONNECTOR on Facebook which is a software that helps you target specific Facebook groups and automates your first direct outreach message.

In essence this software acts as your automated V/A to start with.

The only problem with this... is that the software doesn't know your core client avatar deeply, so it just automates and adds anyone from the targeted groups and sometimes the groups you are going after have non targeted leads from third world countries with no money to invest in your offer! This is known as **TRAFFIC YOU DO NOT CONTROL!**

The software works if you have a really good, targeted group to source leads from but it's not highly optimized!

So, if you want to take it to the next level and SCALE up, hiring a Virtual Assistant will allow you to get more targeted because you have a human perception that will know exactly what leads you are looking for... after they have gone through the training + work kit SOP's that you'll give them. Which means they can check the social media profiles of your perfect potential leads before adding them to your targeted leads database!

You need a V/A that knows the specific leads you are looking for by properly understanding your **CORE CLIENT AVATAR**. One way to do this is by creating a document with your client avatar research that you should have completed during module #1 of the Client Acquisition Accelerator training program.

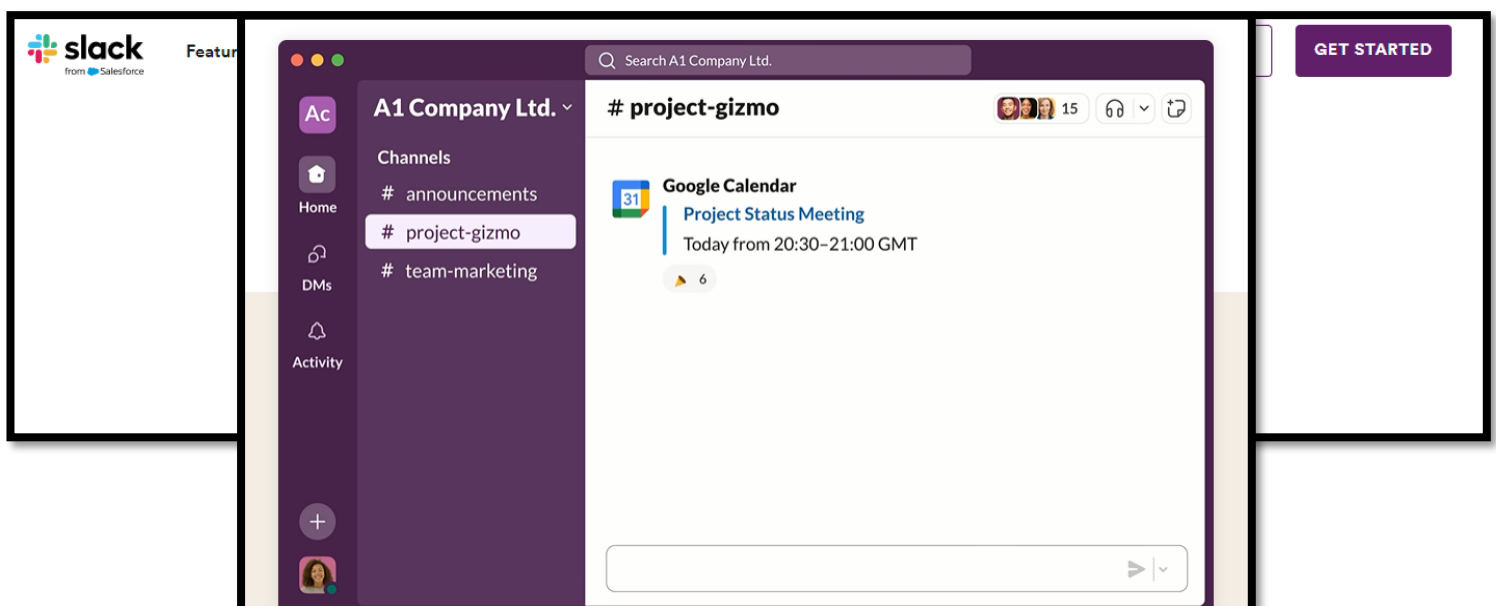
You can also add specific examples of links to social media accounts of your perfect clients or previous dream clients that you have worked with in the past. The V/A will then have a very good understanding on what leads to source by checking their profiles before sending the leads to you in a spreadsheet... with URL links to their social media profile and each day you or your appointment setter can add the leads manually.

Once you have this nailed down and the V/A is hitting the daily KPI's and you have hit \$20,000 per month consistently over the course of 90 days in your business... then it's time to look to hire an APPOINTMENT SETTER to take over by booking qualified calls on your calendar, which I will teach you exactly how to do after we have finished going through the V/A training section!

Setting Up Your Communication Channel!

Before hiring your first virtual assistant, appointment setter and sales rep you need to set up a communication channel where you can communicate with your A-Team and increase productivity. You can use Facebook or WhatsApp to communicate + Email if you're making your first hire and you don't have anyone else on your team!

If you have more than 1 team member already, I personally recommend **SLACK!**



When you are ready to start building your A-Team, click the link below & sign up for an account. You can start for free, if you have a bigger team there are different pricing plans on the website which are very affordable. When you sign up there will be video tutorials on how to use the tool to communicate with your team members and increase productivity by setting up channels.

<https://slack.com/>

Slack allows you to automate routine tasks with the power of generative AI and simplify your daily workflow with all your favourite apps ready to go. You can choose how you and your team want to work!

The tool provides flexibility to work when, where and how it's best for you and your employees. You can easily chat, send audio and video clips, or join a huddle to talk through live.

Slack allow you to bring your team together. You can utilize channels which are organised spaces for everyone and everything that you need for work. In channels, it's easier to connect across departments & time zones.

Let's move onto the...

Virtual Assistant Hiring Protocol



So, the first question you need to ask... before hiring a V.A is...

When Should You Hire a V/A (*Virtual Assistant*) To Help With Your Organic Lead Flow?

When you hit \$10K per month consistently on a specific social media channel e.g. Facebook, Instagram or LinkedIn then it's time to hire your V/A! The key here is to hire a V/A that already has some experience in **LEAD GENERATION** and preferably some experience with content creation.

What To Look For When Hiring Your First \$3/Hour V/A!

- They have a strong foundation and some experience on LEAD GENERATION!
- They have some experience of creating content or they are willing to learn!
- They adapt fast and are reliable!
- They're committed to understanding your core client avatar!
- They are willing to work 8 hours per day!
- They are able to scrape... filter out non targeted leads & bring you 300+ targeted leads /day!
- They're not arrogant and annoying!
- They're able to deliver results on a daily basis on time.

Where To Find \$3/Hour V/A's!

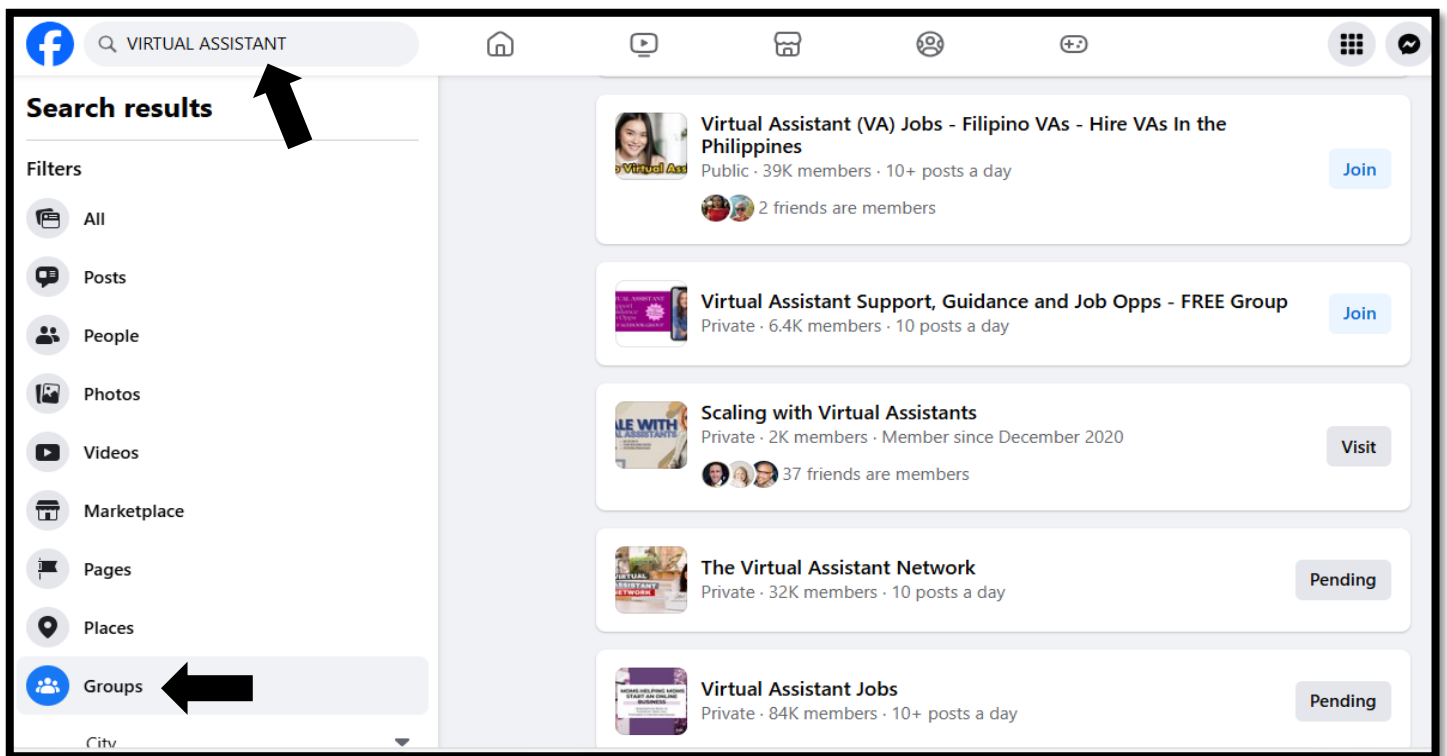
The best place to find virtual assistants is at **Online Jobs PH**. Here you can find some really skilled workers. Many of them have degrees, and the specific skills to help grow your business.



The screenshot shows the homepage of OnlineJobs.ph. The browser address bar displays 'https://www.onlinejobs.ph'. The website header includes the logo 'OnlineJobs | ph', navigation links for 'How it Works', 'Pricing', and 'Real Results', and buttons for 'POST A JOB' and 'FIND JOBS'. There are also links for 'LOG IN' and 'SIGN UP'. The main content area features the headline 'The Job Board for Virtual Workers in the Philippines.' Below this, there are two search options: 'Looking for Talent?' with a 'Search Resumes' button and 'Looking for Work?' with a 'Search Jobs' button. At the bottom, there is a section titled 'Common Talent Searches' and a chat icon.

<https://www.onlinejobs.ph/>

You can also post a job ad in targeted V.A Facebook Groups.



Go to the Facebook search bar and type in "Virtual Assistant", then click "group" and join 10 - 30 groups. Add the groups you think are the best in a spreadsheet and start building your VA database.



Here's a job ad template example you can model. Post it in 15 - 30 V./A groups and build your database in a spreadsheet of peoples responses ready for the interview process!

Full-time Virtual Assistant Required - Must be experienced at generating leads from social media!

The salary is \$500+/Month + bonus commissions!

This is a LONG-TERM position! (40+ hours per week)
(Monday – Saturday... (8 Hours Per Day)

Job Role:



- Lead Generation hitting daily KPI's!
- *(Sourcing 300 - 500+ targeted leads per day!)*
- Willingness to learn our client avatar so you can TARGET TRAFFIC correctly!




Experience in content creation or willing to learn.

- Full training is provided!

Must be an A-PLAYER & have past experience in SOCIAL MEDIA LEAD GENERATION!

Comment below "A-PLAYER VA" if you're interested!

  14 45 comments 1 share

 Like  Comment  Copy  Share

The Virtual Assistant D.A.O Method Workflow Kit = SOP's (Standard Operating Procedures)

During this step you need to create your S.O.P's so your new V.A can get up to speed and understand exactly what they need to do on a daily basis to perform and hit KPI. You can build this page and the document pages in your sales funnel software or any other page builder and then send the V.A the link over messenger or email after the interview process!

What The Virtual Assistant Work Kit SOP For Lead Generation & Content Creation Consists of...

- ✓ **V.A Training Video Explaining The Daily Job Activities!**
- ✓ **Communication Channel – WhatsApp or Slack Tutorial**

- ✓ **Core Client Avatar Document So They Know Who To Target!**
- ✓ **Social Media Group Examples + Perfect Client Targeting Examples So They Have An Understanding of Perfect Clients To Add To Database!**
- ✓ **V.A KPI's (Key Performance Indicators) Document So They Know Daily Targets To Hit!**
- ✓ **Daily Reporting**

When you have created this then you can start building your database of V/A's ready for the interview process!

Creating Your Database of V.A's!

The screenshot shows the OnlineJobs.PH search results page. On the left, there is a sidebar with 'ACTIVE SKILL FILTERS' and a '+/- Add skill filters' link. Below this are various filters: 'EMPLOYMENT TYPE' (Any), 'AVAILABILITY (HOURS)' (2, 12), 'HOURLY SALARY BETWEEN' (3, 3), 'ID PROOF SCORE' (Select ID Proof Score), 'LAST ACTIVE' (Any), 'IQ SCORE' (Any), and 'ENGLISH SCORE' (Any). A black arrow points to the 'ACTIVE SKILL FILTERS' section. The main area shows 'Found 10000 jobseekers.' and a pagination bar with numbers 1 through 8. Two profiles are displayed: Arvin, a Virtual Assistant, and Alyssandra, a Virtual Assistant | Social Media Manager | Content Creator. Each profile includes a photo, name, title, search criteria, education, last active date, and a 'VIEW PROFILE' button.

When you have signed up for OnlineJobs.PH at the link above your next task is to search for potential V.A's that meet your requirements.

You can use the "active skill filter" on the website to enter your V/A requirements, skills needed and the hourly rate you're willing to pay to narrow your search down.

Some of the more skilled V.A's with more experience are going to cost you more than \$3/hour.

During this process you are looking to create a database of 50 - 100 V.A's that you can contact.

https://www.onlinejobs.ph/jobseekers/info/2289263

OnlineJobs | ph

How it Works ▾ Pricing Real Results POST A JOB FIND JOBS LOG IN SIGN UP

Copy the URL into a google sheet or excel spreadsheet

Wendilyn

Executive Virtual Assistant

80 ID PROOF Verified With Timeproof

CONTACT MARK AS HIRED

About Background Check

Contacting Your V/A's Using Online Jobs PH

When you have 50 -100 virtual assistants that you think can do the job required. Click the URL link and contact all 50 - 100 using the following message template

“Hey, I’m looking to hire a virtual assistant that can work 8 hours per day to help with [ENTER JOBS REQUIRED e.g. Social Media Lead Generation & some help with creating content] for my business [ENTER NAME OF YOUR BUSINESS with URL to your home website]

Lead generation experience is a plus but not required as full training will be provided!

If you are interested, please reply back to this message as soon as you can and we can schedule a quick call on Zoom!

Look forward to your reply!

[YOUR NAME]”

The V/A Leveraged Interview Process + Trial!

At this point you should have a database of 50 – 100 potential V/A's sourced from OnlineJobs.PH and targeted V/A Facebook Groups that have shown INTEREST in becoming your new virtual assistant.

You have 2 options here.

OPTION #1 - You can pick the best 5 - 10 people that you think has the most potential and interview them on a 1:1 basis via zoom, Facebook call or by phone!

OPTION #2 - if you want to FAST TRACK the process set up a time and date and send them a zoom link to join a video call. By getting them ALL on a ZOOM meeting at the same time it allows you to screen the best possible candidates fast.

Here's the messaging template you can send when the V/A's have replied back to your first contact message on online jobs.ph or commented back on your Facebook V.A job post.

“Thank you for your reply and interest in becoming a V/A at [YOUR COMPANY NAME]

The interview process will be done over zoom at [DATE + TIME]

Hope you can make it to the call!

>>>> Add Zoom Interview Invite Link Here<<<<

Look forward to having a chat with you!

[YOUR NAME]”

On the interview you'll ask them **THE 1 QUESTION** and you give each candidate 3+ minutes to answer...

Say the following on the interview call:

“Hey, my name is [YOUR NAME]

Welcome and thanks for joining the call on potentially becoming our new virtual assistant here at [YOUR COMPANY NAME!]

Please turn your camera on if you have not done so already!

Can you tell me WHY you think you are the perfect candidate for the virtual assistant role?

Each of you will have 3 minutes to answer.

Who wants to go first?"

This is a pretty ninja strategy because you are looking for the people who are **'go getters'** and have energy & it's usually the ones that go first that are the best candidates!

During this process you are listing down the best people based off their answers, and you want to limit it down to 3-5 of the top candidates.

Tips For the Interview Process

- **Keep an eye out for the candidates that talk first as these people are showing initiative**
- **Look for positive energy levels and passion.**
- **Look for people with the skills you need e.g. Lead Generation etc.**
- **Professionalism!**

Once you have screened out the average / not so good candidates and you have your 3-5 potential future virtual assistants, you'll then conduct another interview with each of them on 1:1 basis which will allow you to limit it down to 2-3. These 2 - 3 will then be put on a 1-2-week trial process by hiring all of them to begin with and pay them accordingly for the work they do.

When hiring a virtual assistant for lead generation, it's important to ask questions that will help you assess their skills, experience, work ethic, and cultural fit. Here are some key questions to consider:

List of Questions You can Ask On The 2nd V/A Interview:

You don't have to ask all these questions on the interview, get straight to the point and pick and choose the ones you think apply best to your interview situation.

Skills and Experience Questions

- 1) Can you describe your experience with [SKILL / JOB REQUIRED e.g. lead generation?]*
- 2) How many qualified leads do you think you can generate per day if we gave you full access to our training + our client avatar template?*
- 3) How many leads have you generated per day on average in the past?*
- 4) What tools and software have you used in the past for lead generation?*
- 5) How do you find and qualify leads?*
- 6) Can you provide an example of a successful lead generation campaign you worked on?*

7) *How do you manage and organize your leads?*

Communication and Collaboration Questions

1) *How do you prefer to communicate with a team?*

2) *How do you handle feedback + revisions and are you coachable?*

Problem-Solving and Initiative Questions

1) *How do you stay updated with the latest trends and techniques in lead generation?*

2) *What strategies do you use to overcome challenges in lead generation?*

Time Management and Reliability Questions

1. *How do you prioritize your tasks and manage your time?*

2. *Can you describe your typical workday as a virtual assistant?*

3. *How do you ensure that your work aligns with the goals and expectations of your client?*

Cultural Fit and Work Ethic Questions:

1. *Our company helps (ENTER CORE CLIENT AVATAR] Why would you want to work with our company specifically?*

2. *How do you handle high-pressure situations or tight deadlines?*

Technical and Analytical Skills Questions:

1. *How do you track and report on the success of your lead generation efforts?*

2. *What metrics do you consider most important in evaluating the success of a lead generation campaign?*

Scenario-Based Questions

1. *If you were given a list of cold leads, how would you approach warming them up?*

2. *Imagine you have to generate leads for a new product in a niche market. How would you approach this task?*

Closing Questions For V/A Interview & Hiring Process!

1. *What is your availability and working hours?*
2. *Do you have any questions for me in relation to the job role and my company?*

KEY TIP >>> Look for candidates who show genuine interest and curiosity about your business and the role. These are usually the best V.A's! Also note, people from the Philippines can be a bit shy so don't be put off by that. Some of the quite ones are the best virtual assistants that can generate qualified leads for your business!

These interview questions above will massively help you comprehensively evaluate a candidate's suitability for the virtual assistant lead generation role, ensuring they possess the necessary skills, experience, and work ethic to contribute effectively to your business growth.

The 1-2 Week Trial Process

When you have completed all interviews with your 3-5 best candidates. Hire 2-3 of them on a 1-2-week trial basis. Here you will see if they are able to hit your KPI metrics.

IMPORTANT KPI Metrics - Each V.A should be able to bring 300 leads per day and send out 100 direct outreach messages per day!

The 2 that you don't hire get put back into your V.A's database for future hire! Or if you need to hire more than 1 V.A to help with lead generation on more than 1 channel you can hire as many as you need to operate on different social media platforms for you!

Pay each of them the \$3 - \$5 per hour for the 1-2-week trial inside <https://www.onlinejobs.ph> providing they have completed the trial jobs to an adequate level!

Getting Your V/A Started In The Operations of Your Business!

The first thing you need to do during the 1-2-week trial is send your new virtual assistants the "**V/A D.A.O Method Workflow Kit = SOP's (Standard Operating Procedures) Link**" ...so they can get the training needed to succeed... and so they can understand what to do to complete the daily tasks required efficiently... by hitting their KPI's (*Key Performance Indicators*)!

Inside your S.O.P's you'll also explain which core client avatar they need to target + the specific social media channel they need to source leads from.

A virtual assistant focused on lead generation usually has a variety of daily tasks and responsibilities that aim to identify, qualify, and nurture potential leads for your business.

However, from my experience of hiring virtual assistants in the past if you try to get them to do too many tasks, they end up underperforming.

So, you'll want to **keep things very SIMPLE for them!**

The main constraint in your business when you are hitting \$10,000 per month consistently is **ORGANIC LEAD GENERATION** due to it taking up too much time to search and source targeted leads! You can also use the power of AI to help you with lead gen, which I will share with you in a moment.

So, before the V.A's start the trial period clearly define the END-GOAL you are looking the V.A's to achieve.

VIRTUAL ASSISTANT DEFINED END GOAL = Create Database In Spreadsheet Of 300 – 500 TARGETED LEADS Per Day With URL Links To Social Media Profiles + Send 50 - 100 Direct Outreach Messages Per Day!

DO NOT TRY TO GET THE V.A TO BECOME A GLORIFIED APPOINTMENT SETTER.

A Virtual Assistant & An Appointment Setter Are 2 Different Job Roles With Different Skills Required!

Overview of V/A daily operations:

PLEASE NOTE: As you scale onto more than 1 social media platform you may need to hire more than 1 virtual assistant + use the power of AI.

1. Research Social Media URL Lead Data Collection

Identify Target Audience: Research and define the ideal customer profile and target audience. Target Facebook Groups, Instagram, LinkedIn Profiles or Scrape Emails!

Collect Lead Information: Use various tools and platforms (*e.g., Facebook LinkedIn, Instagram & Emails*) to gather contact details and relevant information about potential leads. Get the V.A to focus on 1 social media platform to start with and then when you decide it's time to add another platform they can increase the lead flow hire 2nd V/A.

Facebook = 300+ Leads Per Day – Virtual Assistant Starts On 1 Platform & Hits KPI.

LinkedIn = 300+ Leads Per Day – Virtual Assistant Adds 2nd Platform & Hits KPI.

Instagram = 300+ Leads Per Day – Virtual Assistant Adds 3rd Platform & Hits KPI.

Update Lead Lists: Regularly update and maintain lead databases to ensure accuracy and completeness.

2. The 1-2 Message V.A Direct Outreach Method - Fast Track Cold Lead Call Booking.

Social Media Outreach: Like I've mentioned before, when you hire your first V.A have them work on 1 specific social media platform. They should be able to find 300 targeted leads per day.

When they have added the leads to the list have them use a separate social media profile and get the V.A to message 50 - 100 leads per day from the list with the following message copy.

"Hey "NAME"

Great to connect. I am a lead advisor at (ENTER COMPANY NAME)

I see you're in the [ENTER NICHE MARKET] space and doing some amazing things! Keep up the good work! 😊

Our clients have generated [ENTER CLIENT RESULTS] in less than [SPECIFIC TIME FRAME]

You can check out all our amazing client video testimonials at the website link in my profile bio if you like!

Client #1 got this result... after we helped him/her overcome [ENTER BIG PROBLEM #1]

Client #2 got this result... after we helped him/her overcome [ENTER BIG PROBLEM #2]

I have something to genuinely help you grow your business FASTER & EASIER, but I don't want to pitch you without first getting your permission.

If you're interested just send me a "thumbs up" to let me know you're interested?"

Any leads that reply back that are interested get sent directly to you for a 15-minute discovery call or a 30 min – 1-hour results driven strategy call.

3. OPTIONAL – Help With Content Creation & Posting!

Content Sharing: Share relevant content (e.g., get them to schedule posts on social media platforms in the form of blog posts, social media posts, videos, case studies etc)

4. Weekly Team Meeting + Daily KPI Reporting!

Team Meeting With You: The V/A should participate in 1 team meeting per day for the first week... After week one they should be up to speed and hitting the KPI's. Each week after schedule 1 meeting per week for 10 – 15 mins with you to optimize daily workflow,

collaborate together on how you can help them ramp up to KPI and improve. This is also where you can answer any questions they may have.

Monitor KPI Metrics: V.A must track key performance indicators (KPIs) such as... number of leads sourced each day and how many 1st direct outreach messages sent each day.

Prepare & Send KPI Report: V.A must compile and present regular daily reports on lead generation activities and outcomes as well as a daily performance score and send info via slack or email.

5. Best Practices For V.A Daily Operations

- ✓ Prioritize Tasks (*Source Targeted Leads, Send 1st Outreach Message, Post Content*)
- ✓ Stay Organized
- ✓ Maintain Consistency
- ✓ Communicate With You >>> The Business Owner or Social Media / Lead Gen Manager!
- ✓ Time Management (*Deliver Results On Time*)
- ✓ Review and Adjust To Hit KPI's!

By applying and following these daily operations and best practices, your virtual assistant(s) can effectively support lead generation efforts, helping to build a robust pipeline of potential customers & high-ticket clients for your business.

Its then your job to **CONVERT** a % of these leads into booked qualified appointments and sales, until you hire an appointment setter and a sales rep.

V/A Performance Tracking Report & Firing Protocol!

Having a virtual assistant tracking report that the V.A must fill out the end of each day is crucial for the growth of your business in terms of organic lead generation!

You also want to keep tabs on their daily working performance as well. Here is the

V/A Daily KPI's Report (Key Performance Indicators)

Virtual Assistant Name =

Hours Worked =

Number of Targeted Leads Added To Database =

Number of First Direct Outreach Messages Sent =

Productivity Performance Score (1-5) =

(1 = Poor Productivity Performance! 5 = High Level Productivity)

Speed of Work Performance Score (1-5) =

(1 = Poor Work Speed Performance! 5 = High Work Speed Performance)

You can get the V/A to send this report to you each day in Slack or via email so you can keep track of their metrics!

The next thing we're going to talk about is the...

3 Chances Firing Protocol

When the V.A passes the 1–2-week trial phase, you'll hire them on a full-time basis where they will work for 8 hours per day in your business to generate leads, send 50 - 100 1st direct outreach message from their own social media profile and help you to schedule and post content!

Be sure to let them know that if they have not sent many DM's from their own profile previously start with 10 messages and build up each day adding 10 messages a day with 30 mins - 1-hour breaks in between sets, until they have hit 50 - 100 to avoid their social media profile being restricted!

During the onboarding phase you will jump on a quick FB call or Zoom Call and clearly define by going over the END GOALS & Daily KPI's they are expected to achieve.

You will then explain very clearly the **3 Chances Firing Protocol**.

If they miss the daily KPI's 3 times without good reason like illness, personal issues, family issues etc they are let go from your company. This keeps them accountable and allows for positive progress and results. You have to have certain standards in your company, or you will build a team of B & C Players instead of A-Players

A-Players grow your company FAST!

B-Players create operational drag which causes it to stagnate!

C-Players cause problems and need to be fired immediately otherwise your company starts digressing!

On the first time they do not hit KPI, hop on a quick call with them and apply the sandwich technique!

Sandwich Technique =

- 1) Compliment your V.A on something they did well
- 2) Use constructive feedback to help them do a specific task better so they can hit KPI
- 3) Close conversation by giving them confidence to move forward & take massive action!

On the 2nd time of not performing, you hop on a quick call with them and again discuss why they have not hit KPI! Be firm with them if they've made big mistakes by saying...

“Do not make this mistake again, do you understand?”

On the 3rd time of underperforming and making the same mistakes, you should make a decision to fire them! In business sometimes you have to be a bit ruthless, otherwise you build a team of underperformers.

And it's best to get rid of these kinds of people early on because if you don't it will be more difficult to fire them as time elapses... and they will cause you more problems later down the line.

Awesome work.

You now have a **PROVEN SYSTEM** laid out for you so you can hire your first V.A that can generate you targeted leads organically, help you with direct outreach messaging and assist you with sharing your strategical content!

Its then your job to continue to do appointment setting and sales calls, which become the next constraints in your business that you need to hire for which we will talk about next.

Before we do that together (*which you only need to go through after you're making around \$20k per month*) ...

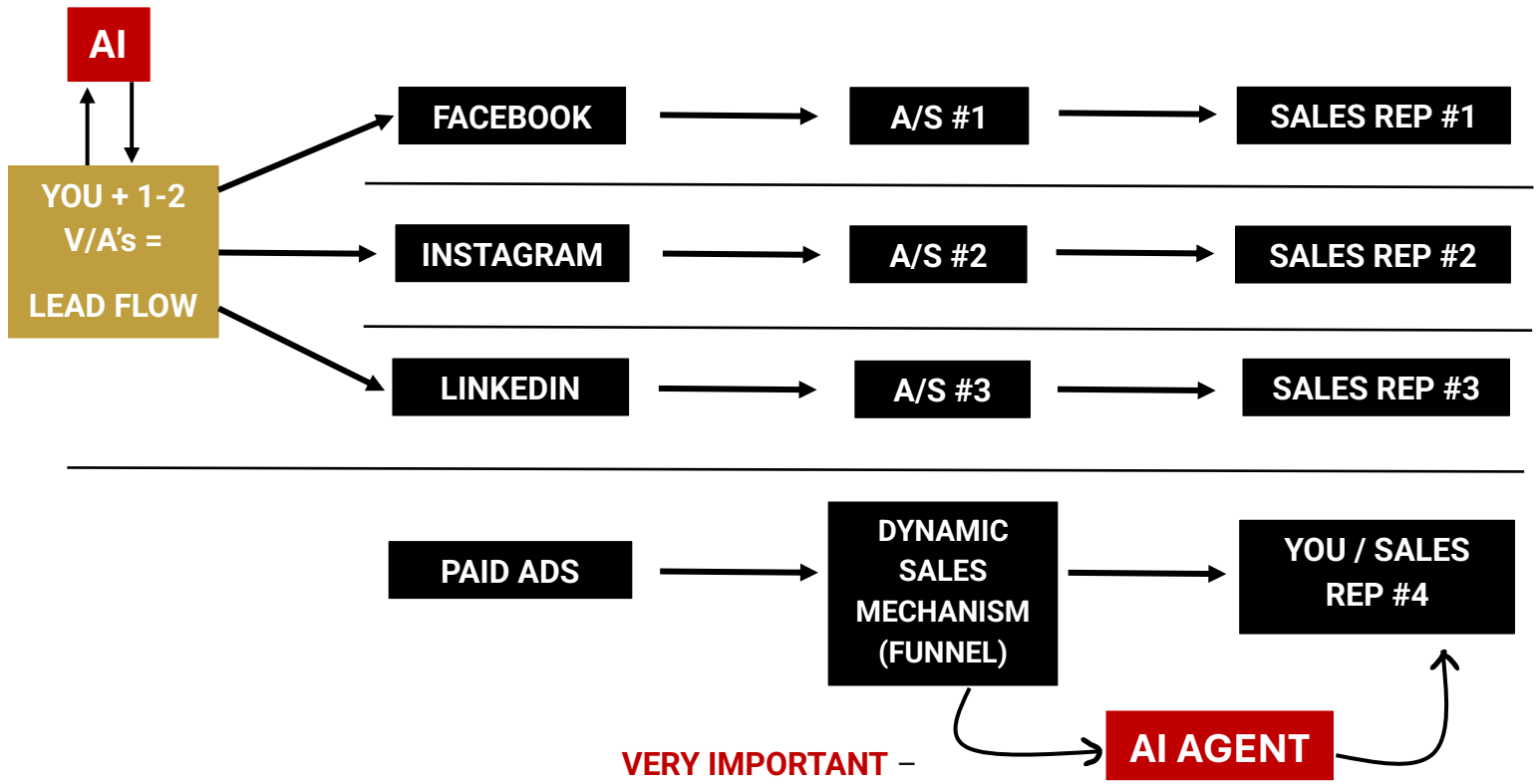
Let's first walk through the...



Hiring Virtual Assistants – ACTION STEPS!



ACTION STEP #1 – Fully Understand The Lean Multi 7-Figure A-Team Blueprint!



Start With **ONE** Social Media Channel That Your Target Market Is Primarily On, Optimize The Process Yourself, Hire A-Players Then **DUPLICATE** Onto The Next Social Media Channel If You Desire!

ACTION STEP #2 – Hire Virtual Assistants Using The V.A Hiring Protocol

7-Figure Team Hiring Protocol

- ✓ **Fully Understand The Overview of Hiring & Operational Constraints!** (Refer To Page 5)
- ✓ **Hire Your First V/A On ONE Social Media Channel To Start With!** (Refer To Page 6)
- ✓ **Set Up Your Communication Channel On WhatsApp, Email or Slack!** (Refer To Page 7)

<https://slack.com/>

Virtual Assistant Hiring Protocol!

- ✓ **When You Hit \$5k - \$10k/Month Look To Hire a V/A (Virtual Assistant) To Help With Your Organic Lead Flow?** (Refer To Page 8)
- ✓ **Understand What To Look For When Hiring Your First \$3/Hour V/A!** (Refer To Page 9)
- ✓ **Find \$3/Hour V.A's On <https://www.onlinejobs.ph>** (Refer To Page 9)
- ✓ **Build Your Virtual Assistant D.A.O Method Workflow Kit = SOP's (Standard Operating Procedures) using your sales funnel software. Create a page with all the information needed for your V.A's to perform and share the link with your V.A's.** (Refer To Page 11)

This should consist of:

1. *V.A Training Video Explaining The Daily Job Activities!*
 2. *Communication Channel – WhatsApp or Slack Tutorial + Your Email Contact Details*
 3. *Core Client Avatar Document So They Know Who To Target!*
 4. *Social Media Group Examples + Perfect Client Targeting Examples... So They Have An Understanding of Perfect Clients To Add To The Lead Database Using Google Sheets or Excel Spreadsheet!*
 5. *V.A KPI's (Key Performance Indicators) Document So They Know Daily Targets To Hit! (Main KPI's = 300+ Leads/Day Added To Spreadsheet + Send 50 - 100 Direct Messages Per Day! Every Lead That Replies With Interest Must Get Sent To You Directly So You Can Book Them On A Call & Convert Them*
 6. *Daily Reporting*
- ✓ **Start Building a Database of V.A's!** (50 -100 Potential Candidates) (Refer To Page 12)

- ✓ **Start Contacting Potential V/A's Using Online Jobs PH By Using The Messaging Script I Gave You Access To! Edit & Personalise The Messaging For Your Specific Business.**
(Refer To Page 13)

- ✓ **Begin The V/A Leveraged Interview Process + Trial of 1-2 Weeks!** (Refer To Page 14)

OPTION 1 – Conduct 1:1 Interviews

OPTION 2 – FAST TRACK – Get All Potential Candidates On a Zoom Call & Interview Them Together. Look For The Ones That Are Go Getters!

(Refer To The Interview Questions You Can Ask On Page 14)

- ✓ **Get Your V/A Started In The Operations of Your Business!** (Refer To Page 18)

- ✓ **V/A Performance Tracking Review & Firing Protocol** (Refer To Page 20)

Set Up a New Gmail Account Specifically For Business A-Team! Here's What Your Virtual Assistants Must Send You Daily

- 1) **Spreadsheet of Targeted Leads Including URL Links of Social Media Accounts**
- 2) **V/A Daily KPI Reporting Email**

They Can Send This In One Email & Attach The Leads Spreadsheet In The Same Email

V/A Daily KPI's Report (Key Performance Indicators)

Virtual Assistant Name =

Hours Worked =

Number of Targeted Leads Added To Database =

Number of First Direct Outreach Messages Sent =

Productivity Performance Score (1-5) =

(1 = Poor Productivity Performance! 5 = High Level Productivity)

Speed of Work Performance Score (1-5) =

(1 = Poor Work Speed Performance! 5 = High Work Speed Performance)

Its then your job to add these leads onto your social media profile... you can also start sending direct outreach messages using the following messaging template and then book them on a call.

On Facebook... when you hit the 5,000-friend limit, you can create up to 4 different personal Facebook profile accounts, but they must be all under one main Facebook account by using the same email address and the same login information.

This will allow you to add up to 20,000 friends / leads that you can direct message. With Facebook pages you can not direct message unless a lead direct messages you first. With a Facebook Profile you can direct message anyone first.

Here's the DM messaging script you can use / model...

MESSAGE #1 – Record a 1 min talking head video with positive energy on your phone and send it to every new friend / lead that you add... or friend / lead that adds you. Save the video on your phone and send it to every new lead / friend by following the script below.

Hey its "YOUR NAME"

I just checked out your [SOCIAL MEDIA PROFILE] (e.g. Facebook profile) and I see you're in the [SPECIFIC NICHE / SPACE] or maybe you're just getting started.

Let me know and I'll maybe send you over some FREE TRAINING to help you and give you some value!

[ADD AUTHORITY] e.g. I've helped my clients make \$3.4M+ in sales and I've consulted / helped a 9-Figure entrepreneur worth \$102Million who was featured on Forbes!

I've now been in the online space for over 7 years now so you could say I know what I'm doing.

Feel free to click on the link in my bio and you can see some of my client results & video testimonials if you like. 😊

Anyway, it's great to connect with you and let me know if I can help you and I'll do my best.

Appreciate ya... have a GREAT day &...

Look forward to your reply.

IMPORTANT – Inside your free training... there must be a CTA (Call To Action) to book a call on your calendar or send you a DM so you can figure out where they are at... and what they want to achieve over the next 90 days. You can then convert them into a high-ticket sale.

MESSAGE #2 – Send As a Written Text Message In The DM's Inbox If They Don't Reply After 2-3 Days.

Hey “NAME”, Are you there?

Did you watch my video message? 🤔

I see you're in the [ENTER NICHE MARKET] space and doing some amazing things! Keep up the good work! 🤔

My clients have generated [ENTER CLIENT RESULTS] in less than [SPECIFIC TIME FRAME]

You can check out some of my client video testimonials & results at the website link in my profile bio if you like!

Client #1 got this result... after we helped him/her overcome [ENTER BIG PROBLEM #1]

Client #2 got this result... after we helped him/her overcome [ENTER BIG PROBLEM #2]

I have something that I believe can genuinely help you [ADD BIG PROBLEM + BENEFIT e.g. book more qualified appointments & grow your business] FASTER & EASIER, but I don't want to pitch you without first getting your permission.

If you're interested just send me a “thumbs up” to let me know you're interested? 🤔

KEY TIP – You can split the written message up into 2-3 messages when sending on social media, so it looks more natural and edit / personalise it for your business / offer.

Save the text in 'notes' on your phone and copy and paste it over so you don't have to keep rewriting it, which will save you time.

BONUS TIP - SCALING YOUR LEAD GENERATION



If you want to take your **LEAD GEN** to the next level... when it comes to B2B lead generation, you can use AI software tools like **LinkedIn Sales Navigator** and **UpLead** which gives you control, precision, and speed.

This only applies if you are selling Business 2 Business & not Business 2 Customer.

With these tools... you're not guessing who to target... you're pulling verified, high-intent data directly from decision-makers, filtered by industry, role, company size, revenue, and even tech stack.

LinkedIn Sales Navigator lets you identify and engage the exact people you want inside your ideal client ecosystem so you can connect with them and send them a DM on the platform.

While **UpLead** ensures every contact is verified, accurate, and enriched with key insights before outreach begins.

No wasted time, no inflated lists, no "maybe" leads.

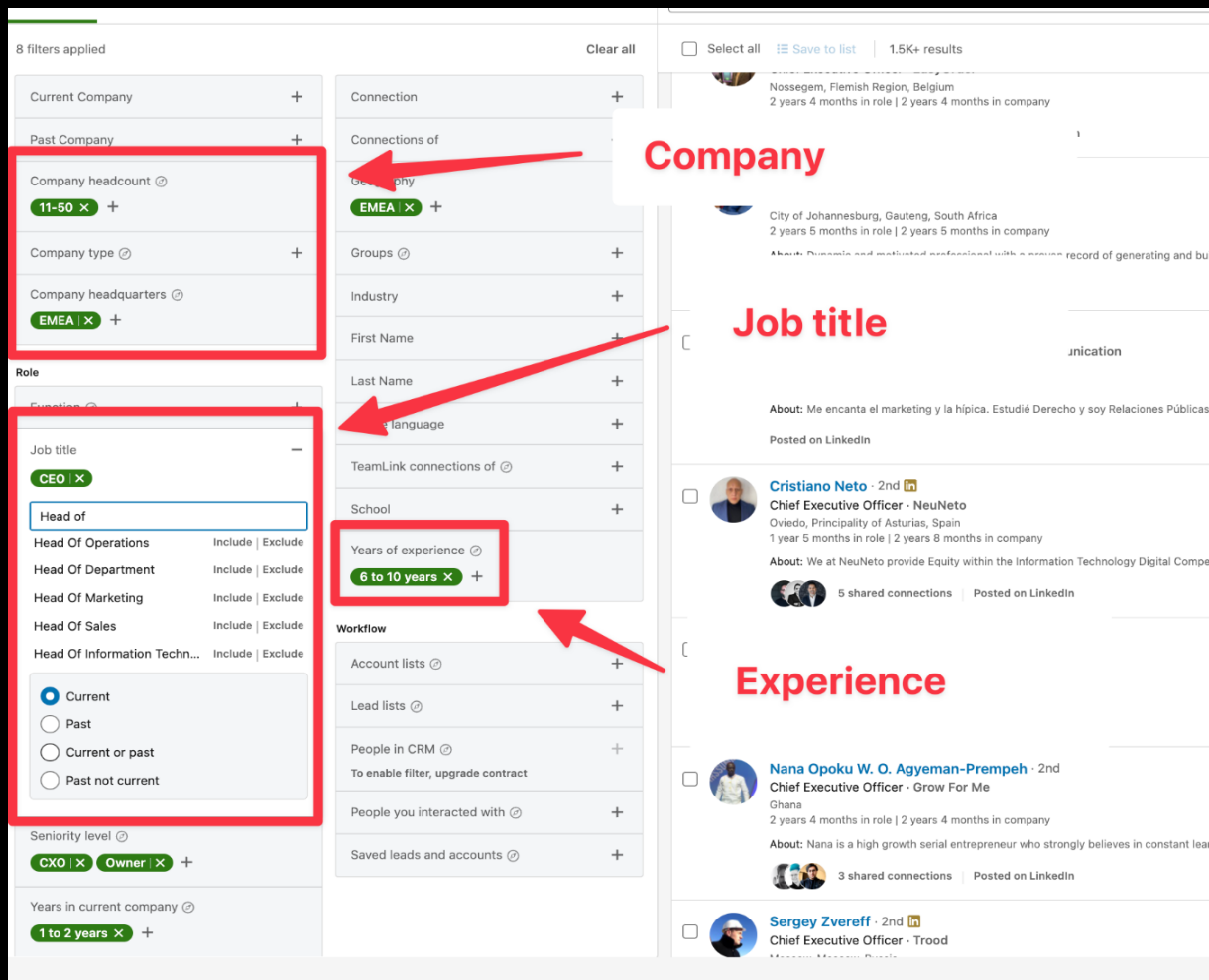
You own the process, the data, and the quality.

This is how you scale predictably, keep your pipeline full, and close higher-value deals faster & easier... with tech that never sleeps and targeting that's razor sharp.

Both of these AI lead generation tools start off at around \$99 per month and allows you to scale your lead generation, while your V.A's continue to bring you leads for your social media profile accounts.

And if you follow what I taught you in the paid traffic module of C.A.A, this is where you will never run out of targeted leads ever again. Because you'll be leveraging **MSOT (Multiple Sources of Traffic)**

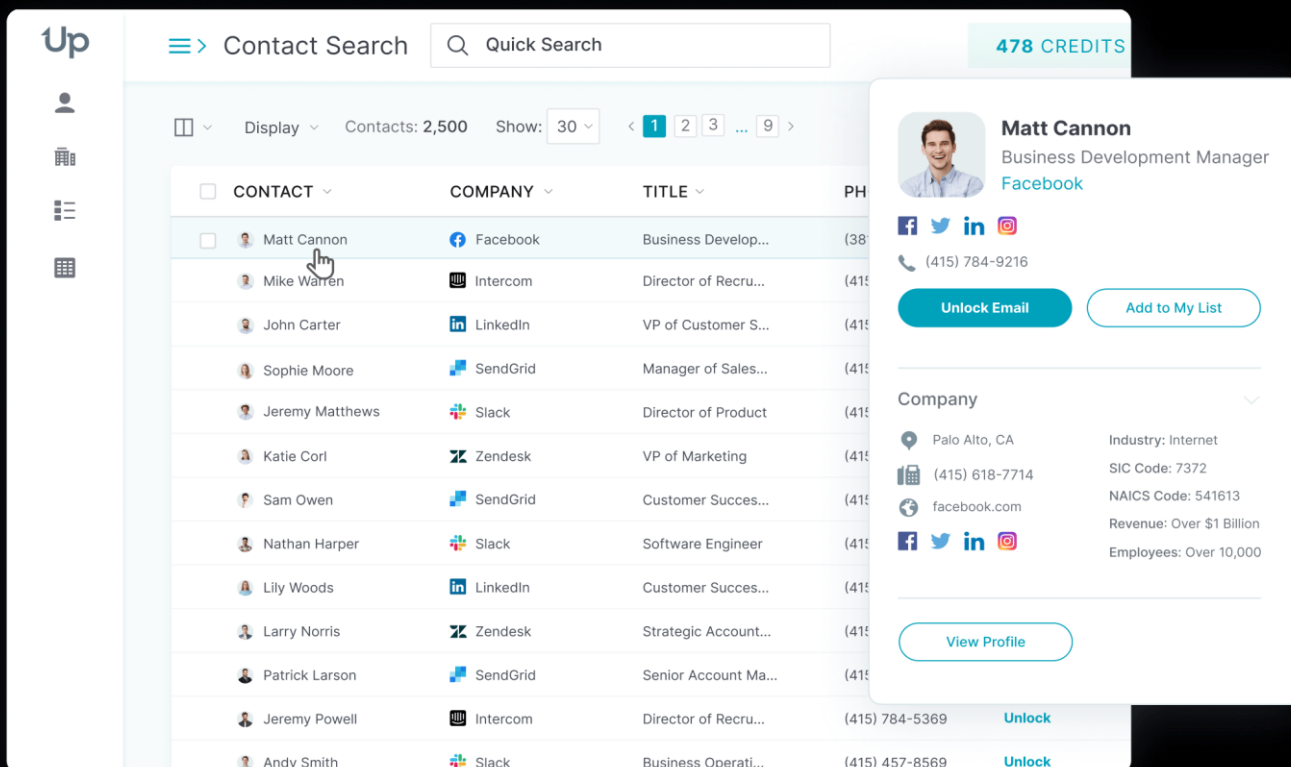
Here's a screenshot of the search criteria using **LINKEDIN SALES NAVIGATOR**.



[Click Here To Get Started With LINKEDIN SALES NAVIGATOR >>](#)

Here is a screenshot of **UPLEADS** contact search results example.

You can get emails, phone numbers and even the social media URL's of business decision makers that have money to invest.





CASE STUDY

Kyber Security Generates \$400k in Pipeline and Achieves 1,800% ROI with UpLead

[View Case Study](#)

UpLead

Platform ▾

Our Data

Resources ▾

Partner with us

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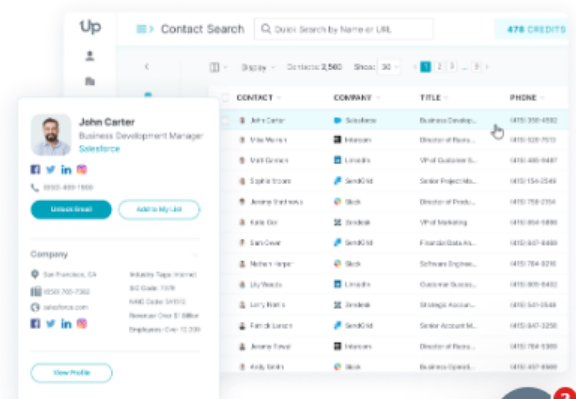


[Request a Demo](#)

[Start Free Trial](#)

Real-time verified B2B emails, mobile numbers and intent data

- ✔ **160M+ leads**, verified as you search and ranked by freshness
- ✔ **95% data accuracy**, equal or higher than the best-known tools
- ✔ **1/3 of the cost** vs leading sales platforms
- ✔ **24-7 support** from real humans
- ✔ **0 feature fluff** to slow you down - get started and get prospecting



[Grab 5 Free Leads Now](#)

[Click Here To Start Your FREE TRIAL With UPLEAD >>](#)

Pick **ONE AI LEAD GENERATION SOFTWARE** to begin with. My advice would be to start with UPLEAD and when you need more leads progress on LINKEDIN SALES NAVIGATOR.

Fantastic work! Next up...

Appointment Setters Hiring Protocol



Welcome to the **Appointment Setting Hiring Protocol**. Inside this section of the training, we are going to dive deep into the process of hiring A-PLAYER appointment setters so you can free yourself from the daily grind of doing...

- **Daily Direct Outreach...**
- **Following Up In The DM's Inbox...**
- **Booking Qualified Appointments On Your Calendar &**
- **Following Up To Convert Potential Future Clients That Are On The Fence To Buying!**

*I've been there and I know exactly how you **FEEL!***

Its tiring, boring, frustrating and deep down you know these important tasks need to be completed DAILY to grow your business... because without appointments booked on your calendar or selling in the DM's + over sales calls you do not have a business.

However, I also know that you want to work in your **Z.O.G (Zone Of Genius)** building cool stuff, creating real value and helping your clients get results while...

Working ON Your Business Not IN Your Business!

So, the first question to ask is...

When Should You Hire An Appointment Setter?

When your offer (M.D.I.O) is dialled in and you've hit \$20,000 per month consistently on ONE specific social media channel: e.g. Facebook, Instagram or LinkedIn and you have a **CONSISTENT FLOW OF LEADS** that are targeted then it's time to think about hiring your first appointment setter.

The reason for this, is because to get an A-Player appointment setter that has training, the skills required, and experience is a race to the top, and the good ones will not stay around for long if you don't have enough qualified lead flow.

I'm going to show you EXACTLY where you can find these specialized skilled people and the hiring process + the KPI's so they can come into your business and ramp your PROFITS up to 6 and even 7-Figures FAST... without you wasting time on social media all day!

Hiring an appointment setter can be a crucial step for businesses looking to streamline their sales process and ensure that their sales teams are focusing on qualified leads.

Let's dive deeper together...



7-STEPS TO HIRING A-PLAYER APPOINTMENT SETTERS OVERVIEW

Here's the **PROVEN 7-STEP GUIDE** to help you hire an effective appointment setter that we're going to dive deep into together:

1. Define The Job Role & Requirements! (*What You're Looking For?*)

- A-Player A.S Anatomy
- Skills Required
- Experience Level
- Job Description

2. Finding A-Players + D.A.O Method A.S Work Kit (S.O.P's)

- Where To Find Appointment Setters? – The 5 Gold Mines!
- Creating Your Appointment Setter Work Kit (S.O.P's)

3. Create You're A.S Job Posting!

- Write a Compelling Ad
- Distribution Channels

4. Asymmetric Applicant Screening!

- Resume Review
- Initial Screening Call

5. Conduct Interviews & Evaluate Skills!

- Creating Your A.S Database
- Initial Screening Call
- Conducting The Interview
- Interview Behavioural Questions
- Role-Play Scenarios + Communication Test!
- Assess Cultural Fit – Do they align with your VISION, MISSION & PRINCIPLES?
- Technical Skills (*Do They Understand How To Use Slack & CRM?*)

6. Narrowing Down & Making An Offer!

- Competitive Compensation (Base Salary + Commission %)
- Clear Job Offer

7. Onboarding Your New Hire & Ramp Up To KPI (*Key Performance Indicator*)

- Training re: (*Offer + Messaging + Call Booking Process + Follow Up Process + Tracking!*)
- Team Integration
- KPI Metrics Clearly Explained & Daily Report
- Reporting (S.O.D.R + E.O.D.R)

By following these steps, you can effectively find & hire A-Player Appointment Setters who will contribute to your business's sales efforts by booking appointments, following up and

help you & your sales team focus on closing high-ticket deals with qualified leads + will enable you to work in Z.O.G!

A-Player A.S Anatomy - What You're Looking For When Hiring An A-Player Appointment Setter!

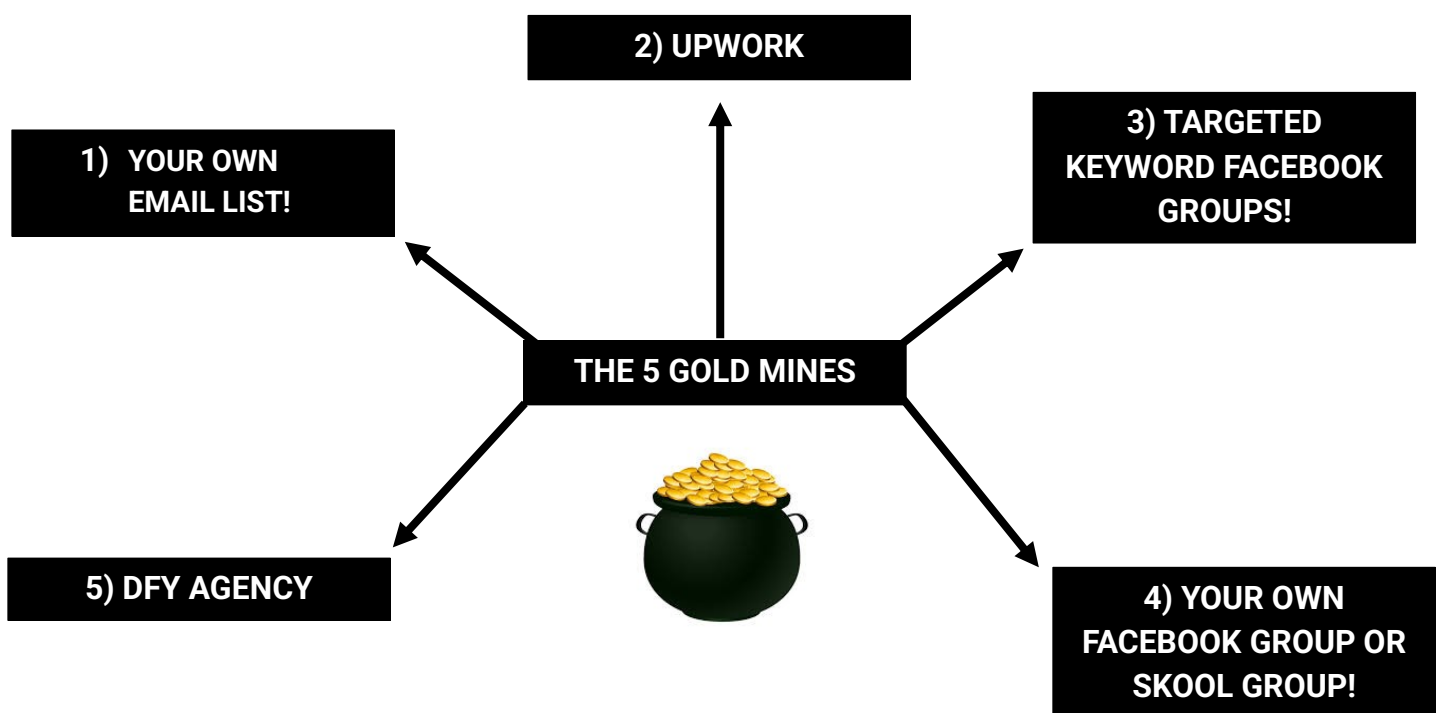
- They have the skill set + preferably some previous experience of A/S!
- They are a fast learner so they can understand your offer!
- They are coachable, dynamic & friendly!
- They buy into your culture, vision, mission and principles!
- They're able to work 8 hours/day and do not have another job or business on the side!
- They take positive feedback well & adapt fast!
- They have a high level of E.I (*Emotional Intelligence*) so they can build a relationship & trust with your leads and prospects!
- They can book qualified sales calls on your calendar on a CONSISTENT daily basis!
- They can ramp up to KPI within 2+ weeks!

From this information you can create a **JOB DESCRIPTION** by copying and pasting the text above into Chat GPT by using the following prompt:

“Write a job description for an appointment setter in the [ADD YOUR NICHE] using the following text >>> [COPY & PASTE THE BULLET POINT TEXT ABOVE]”

The 5 Gold Mines! - Where To Find A-Player Appointment Setters!

There are 5 main places you can look which are as follows:



1) Your Own Email List

A good place to start to find appointment setters is from your own email list if you have one.

So, if you have been targeting your traffic correctly... you have an email list size of 5,000 – 100,000+ subscribers and you've been emailing on a regular basis, many of your subscribers will be familiar with your offer including the benefits, features and advantages!

Some of them will be the perfect fit with the potential skill necessary to become your new appointment setter!

Craft a compelling email using the job description with a personalized subject line and clearly outline the role's, responsibilities and benefits of your A.S job.

You can also use the “*appointment setter job ad copy*” that I am going to give you as we move through this bonus training module together.

Give your email subscribers a CTA (Call To Action) to REPLY BACK TO YOUR EMAIL if they are interested and then follow what I am about to teach you in relation to the interview, screening and hiring process!

Send the email at an optimal time. 3PM GMT is best for most lists to increase open rates!

Here are some **Proven Subject Lines** you can use...

“[HIRING] Want To Make \$5k-\$10k Per Month As Part Of My Team?...”

“[HIRING] Base Salary + Commission! INTERESTED?...”

“[We're Hiring] Want To Join Our A-Team? ...”

“Looking For A-Players To Join Our Team...”

“[Hiring!] Can You Book Appointments?”

“Are You An Appointment Setter? OPEN UP NOW”

Short and Sweet Subject Lines:

“Appointment Setters Wanted...”

“Join Our Sales Team...”

“High-Energy Appointment Setter Needed...”

“Looking For a Sales Superstar...”

Benefit-Focused Subject Lines:

“Lucrative Commission Opportunity for Appointment Setters...”

“Fast-Track Your Sales Career...”

“Build Your Sales Skills with Us...”

“Earn While You Learn As An Appointment Setter...”

Urgent and Intriguing Subject Lines:

“We’re Hiring Appointment Setters – APPLY NOW!...”

“Limited Spots Available: Appointment Setter Position...”

“URGENT: Appointment Setter Needed Immediately...”

You can also use these subject lines as **ATTENTION GRABING HEADLINES** in your appointment setter job ad!

You’ll then use the job ad copy in the email that is documented inside this module titled **“Creating Your Appointment Setter Job Ad”** with a CTA to reply back to your email!

2) Upwork

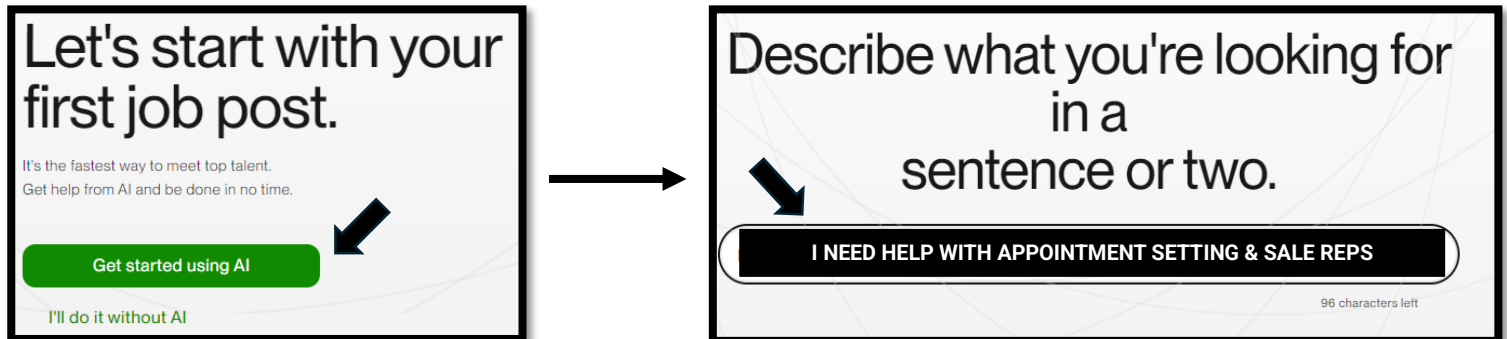
The 2ND place you can find appointment setters is **UPWORK.COM**

<https://upwork.com>

This website is similar to Fiverr.com which I shared with you to find your \$3 PER HOUR VIRTUAL ASSISTANT, however there are more skilled workers that are more expensive on Upwork that can do a variety of jobs for you including:

- ✓ **Appointment Setting**
- ✓ **Sales Reps**
- ✓ Graphic Design
- ✓ Copywriting
- ✓ Funnel Building
- ✓ Paid Ads & Media Buying!
- ✓ Lead Generation
- ✓ Email Marketing
- ✓ Social Media Marketing
- ✓ Content Creation

Set up your account with Upwork and then click the “get started using AI” button to get your started. You can then describe what kind of job you’re looking to hire for as seen below...



AI (*Artificial Intelligence*) will then match you with appointment setters and sales reps to work in your business for you.

COPY & PASTE THIS TEMPLATE INTO THE JOB POST SECTION ON UPWORK WHEN SETTING UP YOUR ACCOUNT!

We are seeking experienced appointment setters and sales reps to join our team. As an appointment setter, your primary responsibility will be to schedule meetings and appointments on our calendar with qualified leads & potential clients.

You will be provided with a list of leads and will need to reach out to them via direct message, phone or email to set up appointments. As an appointment setter / sales rep, you will be responsible for converting leads into qualified appointments & sales by effectively communicating the value of our product and service offers.

Skills required:

- Excellent communication and interpersonal skills*
- Proven experience in appointment setting and sales*
- Strong negotiation and persuasion abilities*
- Ability to work independently and meet targets*
- High E.I (Emotional Intelligence) so you can build relationships and trust with leads*
- Familiarity with daily reporting and CRM tracking software*

This is a long-term position for the right person. We are looking for someone with a high level of expertise in appointment setting and sales. If you are motivated, goal-oriented, and have a proven track record in sales, we would love to hear from you!

After that you will be taken to the payment set up. All payments are held in Upwork so you don't have to pay anything until you have agreed to hire someone and they start working for you.

Next, you'll want to narrow down your search to the following filter criteria below & by searching for the key word...

- ✓ **6 LOCATIONS (UK, US, NZ, AUS, CANADA & SINGAPORE)**
- ✓ **ENGLISH LEVEL (1) FLUENT IN ENGLISH**
- ✓ **SKILLS (1) APPOINTMENT SETTING**

"APPOINTMENT SETTER"

The screenshot shows the Upwork search interface. At the top, there are navigation links for Jobs, Talent, Reports, and Messages. A search bar contains the text "appointment setter". Below the search bar, three filters are applied: "Location (6)", "English level (1)", and "Skills (1)". The "Advanced" filter is also visible. Below the filters, two candidate profiles are displayed. The first profile is for Sherry M., a Boosted profile, with the title "Expert Sales/Appointment Setter + Process/Research/Scripts/Coaching" and a location of "United States". Her hourly rate is \$175/hr, and she has a 100% job success rate and over \$600K earned. Her skills include Lead Generation, Telemarketing, Sales, Cold Calling, B2C Marketing, B2B Marketing, and Sales Optimization. The second profile is for Christian G., with the title "Sales- appointment setter" and a location of "United States". His hourly rate is \$3/hr and he has \$0 earned. His skills include Virtual Assistance, Customer Care, Customer Analysis, Data Entry, Data Collection, and Customer Retention. Both profiles have an "Invite to Job" button.

Some of the appointment setters are expensive on Upwork but you can find good ones at a cheaper hourly pay rate!

You just have to go through and find the ones you think are best based off the criteria I previously shared with you in the **(A-Player A.S Anatomy - What You're Looking For When Hiring An A-Player Appointment Setter)** section of this training module and by looking at their Upwork profile.

You'll then click the green "INVITE TO JOB" button and they will be able to view your job ad and send you their resume to apply!

3) Targeted Keyword Facebook Groups

The next place to find A-Player appointment setters is by targeting specific targeted Facebook groups, start by identifying groups that cater to professionals in sales, marketing, or telemarketing fields, as these are likely to have members with the relevant skills and interests.

I'm going to give you access to a list of groups that you can join

Before we do that, you can use the following key words that you can type into Facebook's search bar and find groups with appointment setters inside.

"Appointment Setters Group"

"High Ticket Sales Group"

"Sales Closer Group"

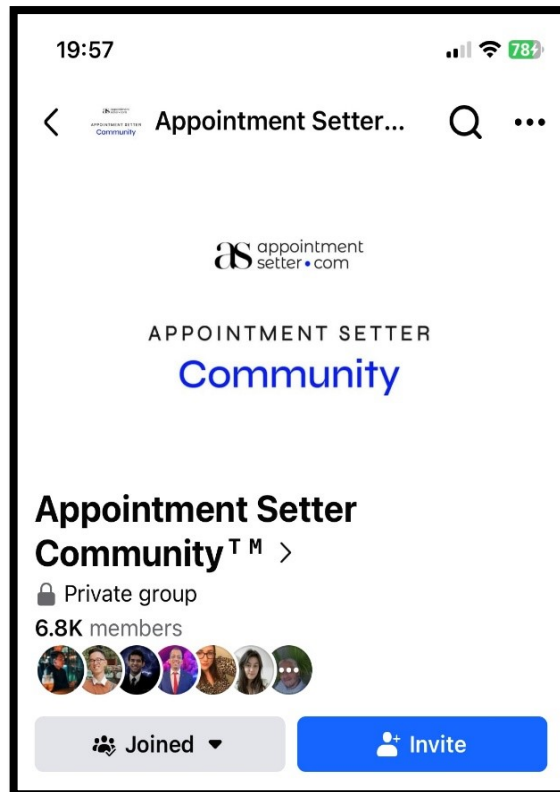
"Inbound & Outbound Closers Group"

Join 5 -10 targeted keyword phrase Facebook groups to start with that have over 5000 group members inside that you think potentially has appointment setters in.

Then post a clear and enticing job opportunity ad with an eye-catching IMAGE to grab attention using the A.S AD FRAMEWORK inside this module, detailing the responsibilities and benefits of the appointment setter role.

Once you have your 5-10 groups leverage Facebook's related groups functionality to find other groups related to, appointment setting remote work, or specific industries you are targeting.

Each group that you feel has A-Player Appointments setters in, by determining response in terms of comments and vetting the people responding to the job posting ads inside the group, add the Facebook link URL inside your V.A, APPOINTMENT SETTER + SALES REPS GROUP DATA BASE using google sheets or excel spreadsheet! See example below...



Just search the 'group name' on Facebook search and join the groups.

4) Your Own Facebook Group / Skool Group

The next place you can find A-Player appointment setters is inside your own Facebook Group or your Skool Group if you have one. Again, this works very much like your own email list where you can find talented and skilled workers that already have some understanding around your offer!



5) Agency

To find an appointment setter using an agency, you can start by researching and selecting a reputable recruitment or staffing agency that specializes in sales and customer service roles.

Look for agencies with a strong track record and positive client testimonials, as these can provide insight into their effectiveness and reliability.

Once you've chosen an agency, clearly communicate your specific requirements for the appointment setter role, including key responsibilities, required skills, experience level, and any industry-specific knowledge that might be beneficial.

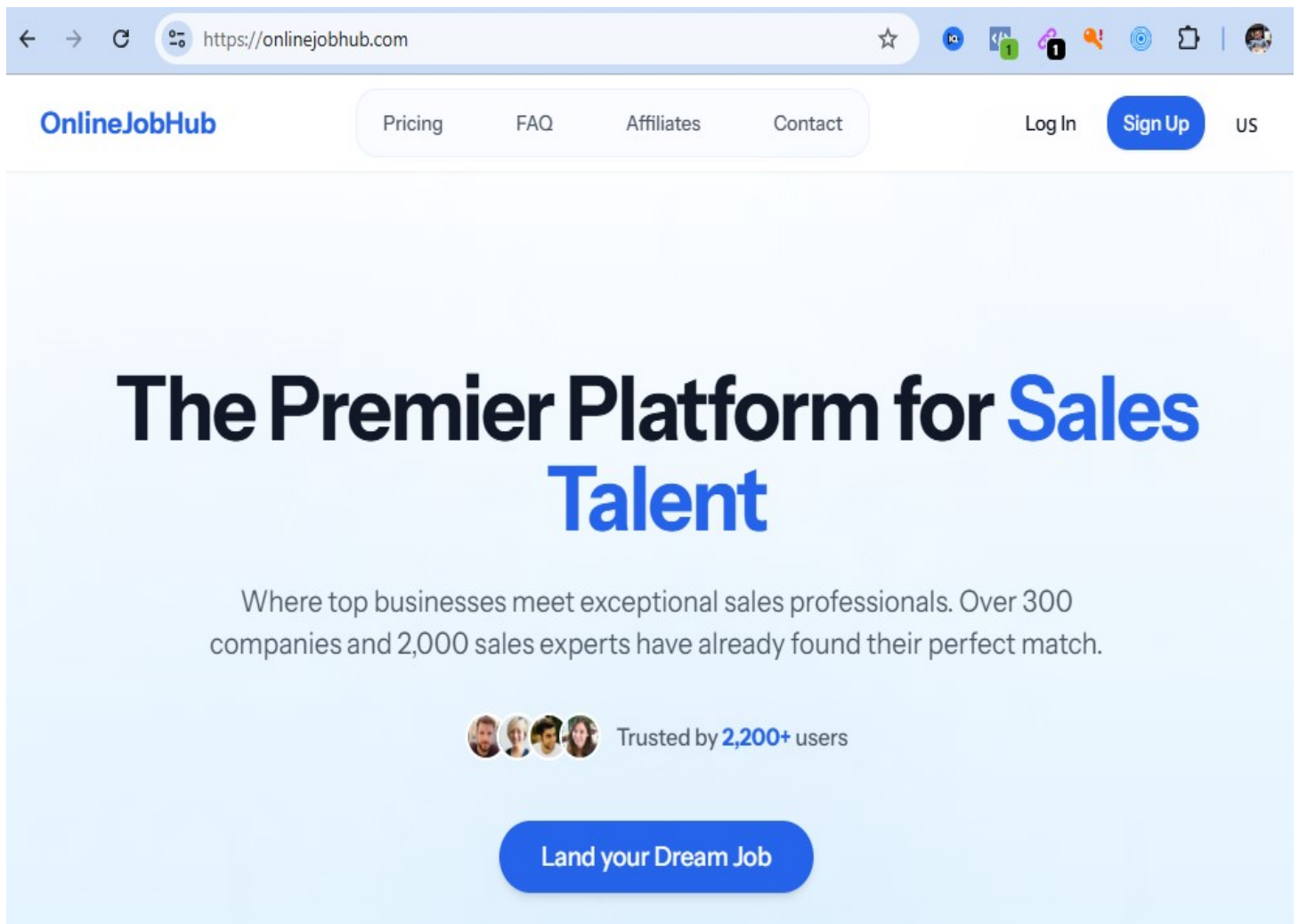
By leveraging the agency's expertise and network, you can efficiently find skilled A-Player appointment setters who can massively contribute to your business growth.

3 of the best agencies I recommend are:

1. **Online Job Hub** = <https://onlinejobhub.com/>
2. **Find a Setter.Com** = <https://www.findasetter.com>
3. **Closers.io** = <https://closers.io/>

Online Job Hub is the smart move if you want to find fully trained appointment setters for your business. You can post your role, attract candidates who already understand outreach, booking calls and closing, and filter for the ones who match your brand's tone, voice and performance metrics.

This allows you to select proven talent, trial candidates quickly, and convert more leads with less friction. It's about plugging in people who get your brand, hit targets, and free you up to focus on strategy & conversion, while they handle the pipeline.

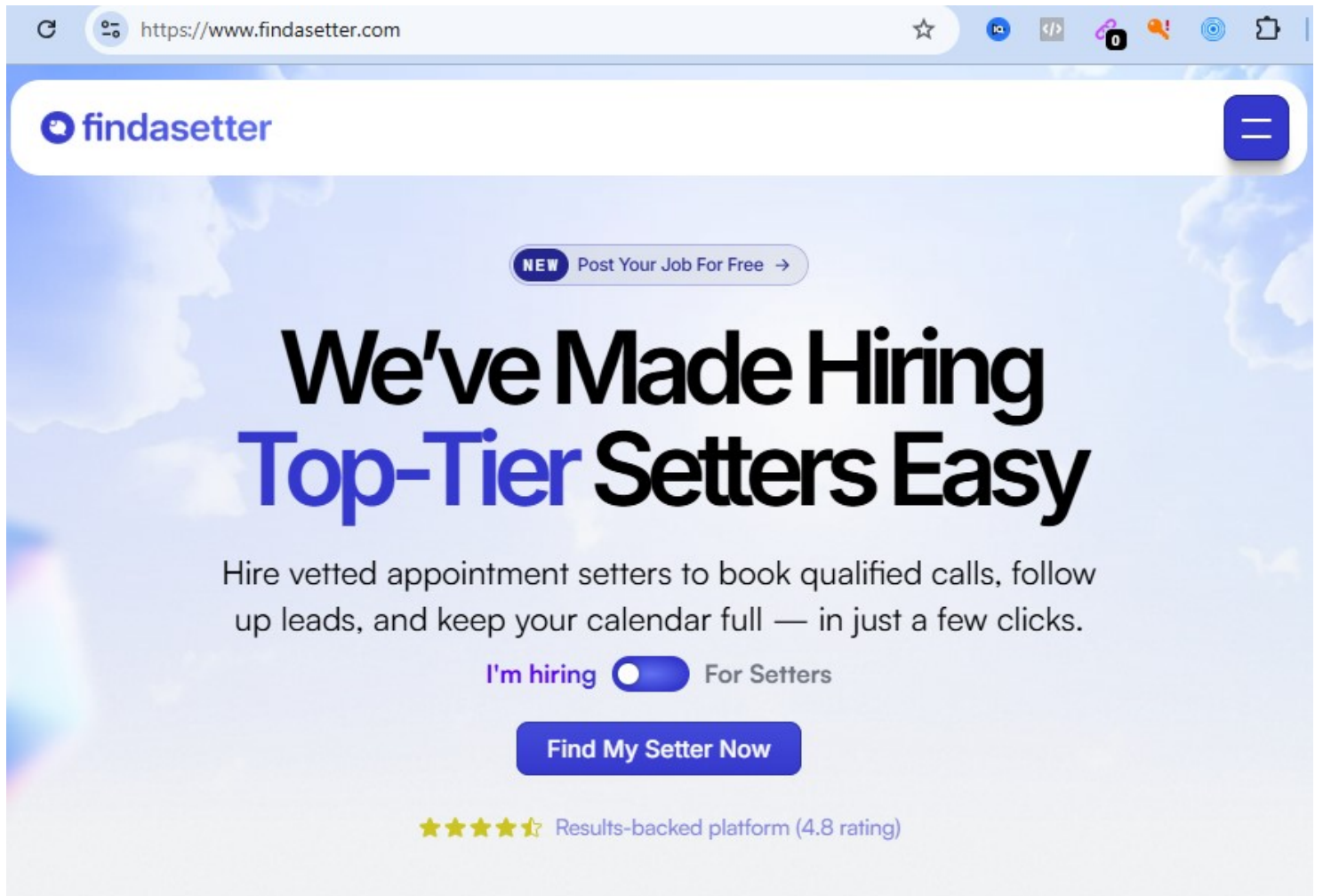


The screenshot shows the homepage of OnlineJobHub. The browser address bar displays "https://onlinejobhub.com". The navigation menu includes "OnlineJobHub", "Pricing", "FAQ", "Affiliates", "Contact", "Log In", "Sign Up", and "US". The main heading is "The Premier Platform for Sales Talent". Below the heading, it states: "Where top businesses meet exceptional sales professionals. Over 300 companies and 2,000 sales experts have already found their perfect match." There is a section with four profile pictures and the text "Trusted by 2,200+ users". At the bottom, there is a blue button that says "Land your Dream Job".

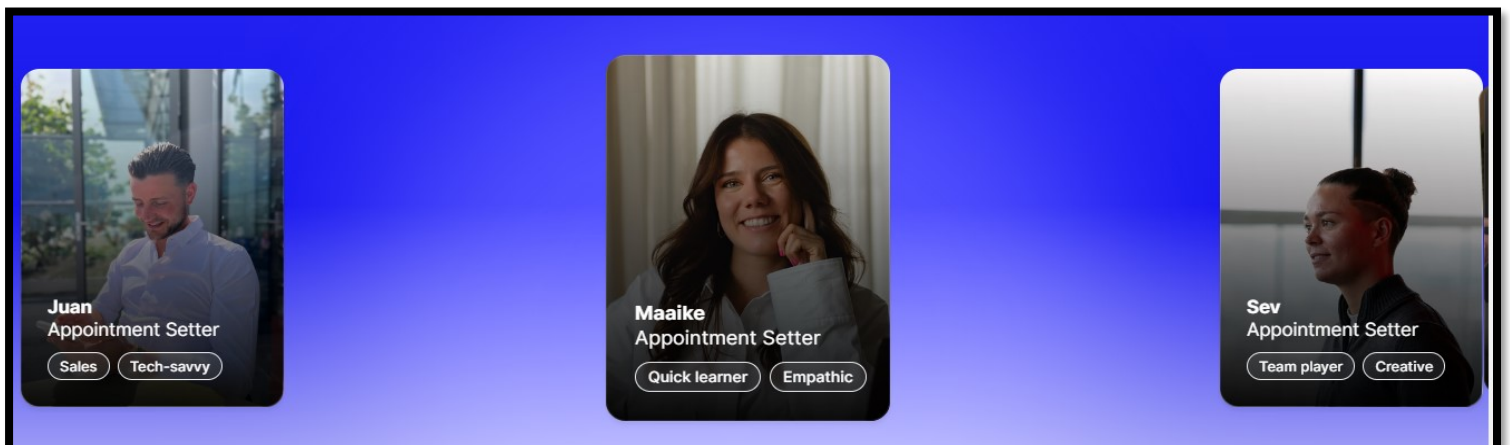
<https://onlinejobhub.com/>

Find a setter.com run by 8-Figure online entrepreneur Bastian Slot will match you up with appointment setters from their pool of certified & fully trained appointment setters. You can start a free trial

You can sign up for an account and get matched with some of the best trained A-Player appointment setters in the industry!



The screenshot shows the homepage of findasetter.com. The browser address bar displays "https://www.findasetter.com". The website header includes the "findasetter" logo and a navigation menu icon. A prominent blue button says "NEW Post Your Job For Free →". The main headline reads "We've Made Hiring Top-Tier Setters Easy". Below this, a sub-headline states: "Hire vetted appointment setters to book qualified calls, follow up leads, and keep your calendar full — in just a few clicks." There is a toggle switch labeled "I'm hiring" which is currently turned on, with the text "For Setters" next to it. A large blue button below the toggle says "Find My Setter Now". At the bottom of the main section, there is a star rating of 4.8 and the text "Results-backed platform (4.8 rating)".



This section displays three profile cards for appointment setters. Each card features a photo of the person, their name, title, and two key skills in rounded rectangular buttons.

- Juan**, Appointment Setter, with skills: Sales, Tech-savvy.
- Maaike**, Appointment Setter, with skills: Quick learner, Empathic.
- Sev**, Appointment Setter, with skills: Team player, Creative.

<https://www.findasetter.com>

Closers.io is a paid option for when you want to SCALE with multiple appointments setters and A-Player sales rep closers! Closers.io is ran by Cole Gordon who is currently doing \$3.9 MILLION PER MONTH, and they've worked with some of the biggest names in the industry!

We Will Place A Proven Appointment Setter In Your Coaching Or Agency Business And If They Don't Book 40 Sales Calls In The First 30 Days - You Don't PAY!*

Watch 5 Minute Video Below For How This Offer Works

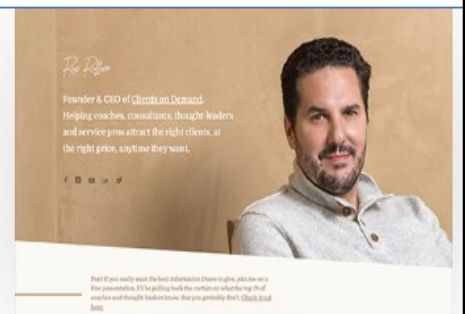


Dean Graziosi



REPORTS FROM THE TRENCHES

Frank Kern



Russ Ruffino



Todd Brown



Jay Abraham



Aleric Heck

<https://closers.io/>

The Appointment Setter D.A.O Method Workflow Kit = SOP's (Standard Operating Procedures)

During this step I advise you to create your S.O.P's, so your new appointment setter can get up to speed and understand exactly what they need to do on a daily basis to perform and hit KPI.

You can build this page and the document pages in your sales funnel builder and then send the A.S the link over messenger or email after the interview process!

Appointment Setters Work Kit - SOP

- ✓ **Team Work Kit Document Which Must Include (Calendar Link, Offer Link, Strategic Content Links, Social Media Account Login Info, Client Testimonials Website / Funnel Link)**
- ✓ **Core Client Avatar Document So They Can Understand The Pains, Problems, Dreams, Goals & Desires of Your Target Market + How To Communicate Effectively With Your Leads To Build Relationships & Increase Trust.**
- ✓ **(M.D.I.O) Offer Document So They Can Understand Your Offer Including Benefits, Features, Advantages + U.M (Unique Mechanism)**
- ✓ **Messaging Script + Video Examples of Successful Conversations That Lead To An Appointment Booked On Your Calendar.**
- ✓ **Appointment Setter Daily KPI's (Key Performance Indicators) So They Understand The Daily Targets They Need To Hit.**
- ✓ **Daily Reporting (S.O.D.R = Start Of Day Report) (E.O.D.R = End Of Day Report)**

I'm going to be walking you through messaging, K.P.I's and reporting as we move through this module together. However, when you have created this then you can start building your database of appointment setters ready for the interview process and your A.S job ad!

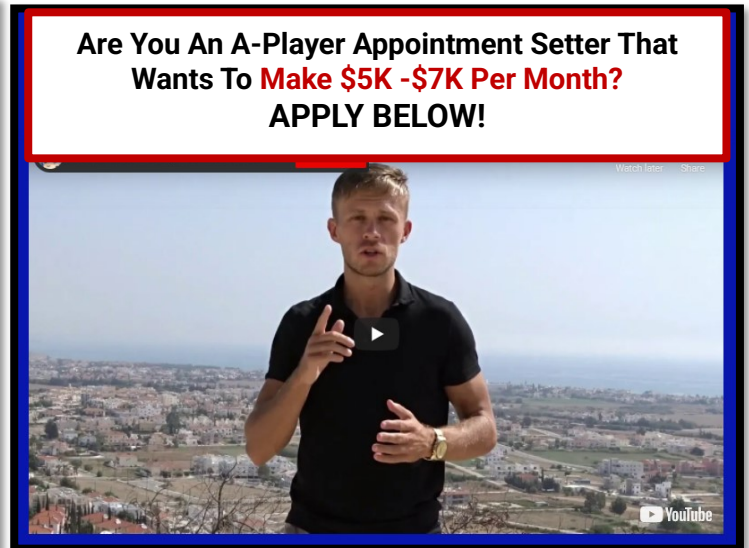
The appointment setters from agencies like Online Job Hub, Find a Setter. Com & Closers. io are already trained on a lot of this stuff, so the main thing you need to focus on when hiring is getting them up to speed with your CLIENT AVATAR and your OFFER so they can start booking appointments on your calendar.

Creating Your Appointment Setter Job Ad!

Okay, so when you've created your Appointment Setter S.O.P's & Work Kit the next action step to take is writing your appointment setter JOB AD and post it into the groups that you've researched!

If you're thinking of getting an appointment setter via one of the **DONE FOR YOU AGENCIES** I shared with you. You do not need to do this. They will find your appointment setter for you or you can look through their database to find an A-PLAYER setter. However, if you are using any of the other methods, you'll need to write an ad.

Here's one of my ads below. Feel free to copy & paste or model my ad and make sure you add in an eye-catching **IMAGE** to grab people's attention.



The goal during this step is to build a targeted data base of qualified...

- ✓ **Virtual Assistants**
- ✓ **Appointments Setters &**
- ✓ **Sales Reps**

...so, if you need to hire more in the future you can simply go to your database and hire from a list of already sourced talent.

Next, we will move onto...

The A/S Interview Process, Screening + Trial!

Awesome work...

Here's what we're going to cover during this step:

- **Resume Review**
- **Initial Screening Call**
- **Conducting The Interview**
- **Interview Behavioural Questions**
- **Role-Play Scenarios + Communication Test!**
- **Assess Cultural Fit – Do They Align With Your VISION, MISSION & PRINCIPLES?**

Resume Review

If you are using Upwork.com to source your appointments setters from, the first thing you need to do is review their resume. This will get sent to your Upwork back office after you post a job and candidates start applying. You'll need to check if they have the credentials in relation to what you're looking for when hiring an A.S!

If you're using any of the other 5 methods to source appointment setters from including: (*email list, targeted key word Facebook groups, your own Facebook group or Skool group or an agency*) then you don't necessarily need to do this, but you can ask for a resume if you feel you need one.

Any candidates that seem a good fit invite them to an...

Initial Screening Call

This is where you'll jump on a quick call via Zoom. The key here is to keep it short and straight to the point. Focus on asking the right questions that allow you to screen out the non-serious candidates and focus on the right ones by inviting them to do a full interview.

Here's some questions you can ask on the initial screening call.

Availability:

“What is your availability to work? Are you available to work full-time or part-time?”

Experience:

“Do you have any previous experience in sales, customer service, or appointment setting?”

“How many appointments do you think you can book per month?”

Why Appointment Setting:

“Why are you interested in an appointment setter position?”

Goal Oriented:

“Are you a goal-oriented individual & how do you measure your success?”

Career Goals:

“What are your career goals?”

“How does this position fit into your future plans?”

The screening process should only take around 5 -10 minutes!

If they answer well, you can then invite them to do a full interview + role play scenario of booking a sales call over messenger.

TIPS For Conducting The Initial Screening Call!

- **Listen Carefully:** Pay attention to the candidate's responses and ask follow-up questions.
- **Assess Energy & Enthusiasm:** Look for candidates who are enthusiastic and passionate.
- **Trust Your Intuition:** The best candidates are the ones where you get a good vibe from on the initial screening call.

By asking the previous questions, you can gain a better understanding of the candidate's seriousness, qualifications and suitability for the appointment setter role.

Any candidates you feel are a good fit are then invited to do a full interview with you, where you'll ask behavioural questions and conduct a role play scenario of booking calls on your calendar.

Conducting The Interview

Interviewing appointment setters involves finding people with **strong communication** & high **E.I skills** which stands for (**Emotional Intelligence**) mixed with the character trait of persistence.

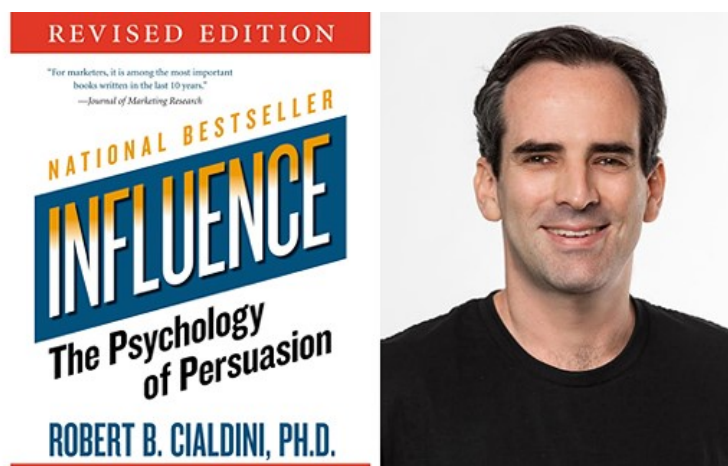
They need to be good at talking to people in the DM's, building **relationships & trust** quickly, and handling **objections** to book qualified sales calls on yours or your sales teams calendar.

It's important to see how they deal with difficult situations and how well they understand the sales process. Asking them to role-play can help you see how they handle real-life challenges which we will talk about in a moment.

To hire an A-Player appointment setter, focus on these key areas:

- **Communication:** How well do they talk to people? Can they be persuasive? Do they understand the basics of influence?

After the 2-week trial period, when you hire your appointment setter, I highly recommend you get them to read the book titled **INFLUENCE by Robert Cialdini** if they haven't done so already, which will help them book more sales calls by understanding the psychology of persuasion!



You can grab a copy of the book and send it to your A.S from Amazon at this link here >>

<https://www.amazon.co.uk/Influence-Psychology-Robert-Cialdini-PhD/dp/006124189X>

- **Relationship & Trust Building:** Can they build rapport fast by understanding the clients pains, problems, dreams, goals and desires and most importantly their VISION for the future?

- **Resilience:** Can they handle rejection and stay positive?
- **Sales Skills:** Do they understand sales? Can they overcome objections?
- **Follow Up Skills:** Are they able to follow up correctly and keep track of leads?
- **Coachable:** Are they able to handle positive feedback and improve. You do not want to hire people with a big ego.

Ask about past experiences, check their knowledge of the industry and listen carefully to see if they are a good fit for your company.

To conduct the interview, you'll organise a 1:1 zoom meeting with a time and date which should take around 20 minutes by asking...

Interview Behavioural Questions

Here are the behavioural question we ask on the full interview: *(Just pick the questions that you feel are needed when conducting an interview with potential appointment setter candidates!)*

Communication Skills:

“How would you describe your communication skills, both verbal and written?”

Target Market:

“Do you have any experience working with our target market of [ADD TARGET MARKET e.g. coaches, consultants, course creators & high-ticket marketers]?”

Overcoming Objections:

“How do you handle objections from potential clients?”

Teamwork:

“How do you work effectively as part of a team?”

Company Knowledge:

“Do you know anything about our company or the products/services we offer?”

Resilience and Sales

“How do you handle sales rejection?”

“What’s your process of following up in the DM’s to book calls?”

Communication and Persuasion

“How do you build the relationship, trust and rapport with leads?”

Time Management and Organization

“How do you prioritize you daily workload?”

“How do you stay focused and motivated?”

“How do you keep track of leads so you can follow up to book sales calls / appointments?”

Technical Skill Question

“Are you familiar with using slack & a CRM?”

Problem-Solving and Adaptability

“How do you handle unexpected challenges?”

“How do you learn from mistakes?”

Once you’ve asked all the questions you feel you need to ask to fully qualify them, and you feel via your **INTUITION** that they’re a good fit you’ll then move onto the...

Role-Play Scenario + Communication Test!

During this step you’ll stay on the Zoom meeting with them and get them to DM you on social media (*Facebook, Instagram or LinkedIn etc*) to see how they COMMUNICATE with you as the potential client to book an appointment / strategy call on the calendar.

- ✓ Here you are looking at their **grammar** and their **conversational written tone** in terms of how they would potentially represent your company.
- ✓ How **quickly they build the relationship, rapport and trust.**
- ✓ How they understand they **nuances** of your business / blue ocean niche in terms of the **big problems, challenges** + understanding the clients **VISION for the future** + what the client wants to **achieve within the next 90 days in terms of RESULTS!**
- ✓ And the last thing you are looking out for is how they **position the CTA (Call To Action) to book an appointment** on the calendar.

A-Player appointments setters will be able to communicate in a way that books strategy calls naturally.

However, if a potential candidate has good communication skills + positive energy on the interview... but they don't perform to a high level on the DM role play test, they can easily learn the conversation process when you give them the S.O.P's + Work Kit.

Assess Cultural Fit – Do They Align With Your VISION, MISSION & PRINCIPLES?

The last step of the interview process is to figure out if the potential candidate is aligned with your vision, mission and principles.

This is something I go deeper into during the advanced bonus modules of C.A.A in relation to business infrastructure! If you are hitting \$10,000 - \$30,000 per month mapping out your vision, mission and principles isn't something you've properly thought about yet.

As you advance and start hitting \$100,000+ per month it's something you need to think about and have mapped out in a digital document or on paper.

Once mapped out... end the interview zoom meeting by explaining your VISION, MISSION & PRINCIPLES and see if the potential A.S candidate aligns with them.

If they do and they're a good fit, you'll move onto the...

Onboarding Process - Getting Your A/S Started In The Operations of Your Business!

The onboarding process for appointment setters typically takes around 6-8+ weeks.

It starts with a 2-week trial with daily feedback sessions... followed by an introduction deep dive into the company culture, vision mission and principles.

New hires then spend a significant amount of time learning about the product or service offers that your company provides! (1 week) and the appointment setting process to book calls and ramp them up to KPI (*Key Performance Indicators*) (2 weeks).

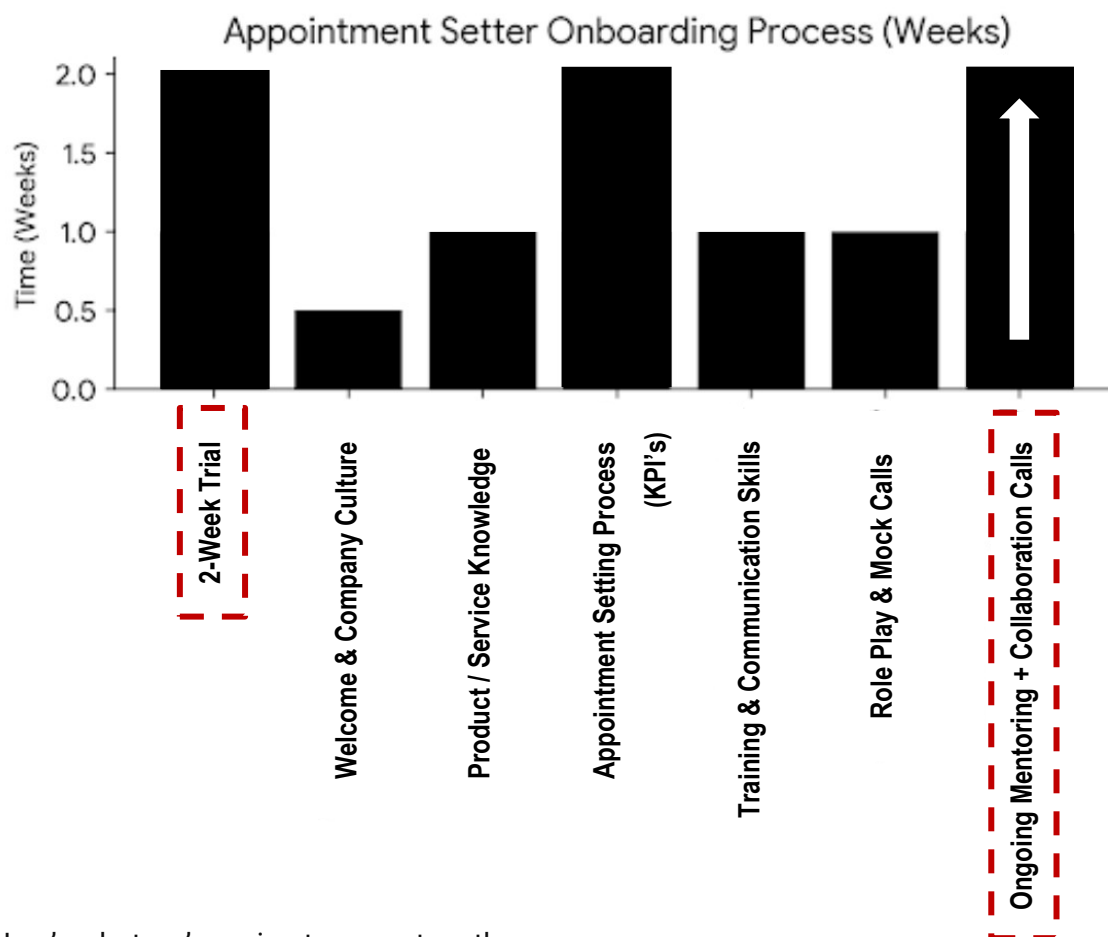
Training on scripts and communication skills (1 week) is followed by role-playing and feedback calls (1 week) to solidify their understanding.

Once they have ramped up to KPI then it's just a case of mentoring & doing collaboration calls so you can increase efficiency and motivation. This will help you get feedback from your appointment setter(s) while coaching them on things they can improve!

DO NOT MICRO MANAGE THEM! It pisses people off!

If they come into your business and they're already an A-Player appointment setter with experience the onboarding process can be reduced to around 2 - 4 weeks instead of 6-8+ weeks.

Which means they can ramp up to KPI pretty fast and take over your DM inbox to book you consistent qualified strategy calls daily!



Here's what we're going to cover together...

- **The 2 Week Trial Period + Feedback Sessions!**
- **Clear Job Offer + Competitive Compensation (*Base Salary + Commission %*)**
- **Training + S.O.P Work Kit: (*Offer + Messaging + Call Booking Process + Follow Up Process + Tracking!*)**
- **Team Integration**

- **A-Player Appointment Setter KPI's (Key Performance Indicators)**

Let's begin

The 2 Week Trial Period + Feedback Sessions!

A two-week trial period for an appointment setter is crucial to assess their performance and compatibility with you and your team if you have one.

At this point you'll give them access to the **A.S Training + S.O.P Work Kit: (Offer + KPI's, Messaging Script + Call Booking Process + Follow Up Process + Tracking)** so they can understand the daily workflow and strategy of booking calls for your offer!

During this time, closely monitor their appointment setting skills + metrics, such as messaging communication & relationship building with leads in the inbox, call booking volume, conversion rates, and how qualified the lead is that booked a strategy call.

Regular DAILY feedback sessions via zoom throughout the trial period are essential for providing guidance, troubleshooting any issues, and ensuring alignment with your company's VISION!

The goal here is to get your A.S ramped up to KPI as fast as possible!

I will share the Key Performance Indicators with you in a moment.

During the 2-week trial period you will pay them 5% commission for any lead that they booked an appointment with that converted into a high-ticket sale!

If they perform well on the 2-week trial, you'll then fully hire them into your company and give them a...

Clear Job Offer + Competitive Compensation (Base Salary + Commission %)

To extend a formal job offer, schedule a Zoom call to present the opportunity.

During this meeting, you'll want to clearly outline the position's **responsibilities and expectations**.

You'll want to have great energy on the call and enthusiastically deliver the good news of their selection, followed by a detailed breakdown of the compensation package. This should include a clear explanation of the base salary, commission structure, and potential earnings.

For full hires of A-Player appointment setters we usually give \$500 - \$800 base salary per month and start them off with 5% commission on each high-ticket sale.

If they have ramped up to KPI and they are booking consistent daily strategy calls on your calendar after a 90-day period, we renegotiate and scrap the base salary and give them 7% - 7.5% of each high-ticket sale closed!

A-Player appointment setters prefer to be paid on a higher commission rather than a base salary, because they know they can deliver results!

By providing a comprehensive overview and creating an open communication line, you can secure their acceptance and build a strong foundation for their employment.

Team Integration

After you've hired your new appointment setter on a full-time basis and agreed on their salary and commission structure... the next step is to integrate them into your team if you have others that need direct communication with them.

For example, a sales rep on a specific channel needs direct communication with the specific appointment setter on the same channel.

Effective onboarding and a clear role definition are essential for seamless collaboration and growth!

By providing comprehensive training on your sales process, product / service offers, and target market, you empower your new hire to qualify leads accurately and set them up to hit KPI's consistently... resulting in your sales calendar being packed out!

Open communication channels and regular team meetings create a supportive environment where the appointment setter can contribute their insights and receive feedback.

Additionally, aligning performance metrics and incentives between the appointment setter and sales team can drive mutual success and strengthen overall team dynamics.

The key here is to make them **FEEL part of the TEAM!**

TEAM = Together Everyone Achieve More!

When you can find an A-PLAYER appointment setter it can easily add an extra \$100,000+ per month to your business top line revenue if your offer and traffic targeting is dialled in!

So, make sure you look after them, give them bonuses or gifts to keep them motivated and treat them with respect!

After you have integrated them into your business the next thing to FOCUS on is...

A-Player Appointment Setter KPI's (Key Performance Indicators)

Here's the KPI's for an A-Player appointment setter.

- ✓ **OUTBOUND – 30+ new direct outreach messages per day depending on social media platform**
- ✓ **INBOUND – 50 – 70+ conversations initiated per day!**

- ✓ 200+ follow up messages per day.
- ✓ 5 – 7+ booked calls per day

A/S Performance Tracking Report & Firing Protocol!

Reporting is crucial when it comes to hiring and keeping appointment setters accountable. It helps track appointment setters' performance, set goals, identify training needs, and improve processes. It provides data for informed decisions, accountability, and motivation

Here's what we will cover during this stage...

- **S.O.D.R = Start Of Day Report**
- **E.O.D.R = End Of Day Report**
- **Firing Protocol**

Let's begin...

S.O.D.R = Start Of Day Report

Here's the metrics we track for the start of day report for appointment setters

- ✓ **Did You Complete 30 Min Morning Routine + Meditation? (YES / NO)**
- ✓ **Energy Level (1-10)**
- ✓ **Focus Level (1-10)**

E.O.D.R = End Of Day Report

Here's the metrics we track for the end of day report for appointment setters

- ✓ **Number of Direct Outreach Messages Sent (Outbound)**
- ✓ **Number of Inbound Direct Outreach Messages Sent (Inbound)**
- ✓ **Number of Follow Up Messages Sent**
- ✓ **Number of CTA's To Book A Call**
- ✓ **Qualified Appointments Scheduled**
- ✓ **Number of Future Sales In Pipeline – Follow Up To Convert**
- ✓ **Hours Worked**
- ✓ **Daily Performance Score (1-10)**
- ✓ **Notes On Qualified Leads / Appointments Booked For Sales Rep**

You can do this using Google Sheets and get the A/S to update the spreadsheet daily. Just be sure when you set this up... you grant them access as "EDITOR" inside Google Sheets

If you don't know how to do that, just simply copy and paste this following keyword phrases into YouTube:

"Goggle Sheets Tutorial"

"How Do I Grant People Access As Editor Into Google Sheets"

Each day you can view the Google Sheet and keep track of their KPI metrics!

The next thing were going to talk about is the...

Firing Protocol

Here we're going to use the same formula for the appointment setter as we did with the V/A... called the **3 Chances Firing Protocol**

When the A.S passes the 2-week trial phase, you'll hire them on a full-time basis where they will work for 8 hours per day in your business to book calls on yours or your sales reps calendar.

During the onboarding phase you will jump on a quick FB call or Zoom Call and clearly define and go over the END GOALS & Daily KPI's they are expected to achieve in relation to messages sent.

Calls booked will vary each day but as long as they hit the daily messages required including

- ✓ **Outbound**
- ✓ **Inbound &**
- ✓ **Follow Up Messages**

Then they will be able to book consistent calls on your calendar.

You will then explain very clearly the **3 Chances Firing Protocol**.

If they miss the daily KPI's in terms of messages sent... 3 times without good reason like illness, personal issues, family issues etc they are let go from your company.

This keeps them accountable and allows for positive progress and results. You have to have certain standards in your company, or you will build a team of B & C Players instead A-Players

A-Players grow your company FAST!

B-Players create operational drag which causes it to stagnate!

C-Players cause problems and need to be fired immediately otherwise your company starts digressing!

On the first time they do not hit KPI, hop on a quick call with them and apply the sandwich technique!

Sandwich Technique =

- 1) Compliment you're A.S on something they did well
- 2) Use constructive feedback to help them do a specific task better so they can hit KPI
- 3) Close conversation by giving them confidence to move forward & take massive action!

On the 2nd time of not performing or making a big mistake, you hop on a quick call with them and again discuss why they have not hit KPI!
Say to them

“Do Not Make This Mistake Again, Do You Understand?”

On the 3rd time of underperforming, you make a decision to fire them!

Awesome work.

You now have a **PROVEN SYSTEM** laid out for you so you can hire your first **A-PLAYER APPOINTMENT SETTER** that can book you qualified appointments on your calendar with **high-ticket clients**

Its then your job to continue to do sales calls, which will become the next constraint in your business that you need to hire for, which we will talk about in a future section of this bonus module!

Before we go over that lets first talk about...

Making Your V/A's... Appointments Setters & Sales Reps Feel Part of The Team & How To Look After Them!

Making your employees feel part of your team involves creating a sense of inclusion and community despite the physical distance of remote working.

Start by integrating them into regular team meetings and communications, ensuring they are kept in the loop about your company updates and goals.

At the start it's just going to be you and 1 Virtual Assistant + Appointment Setter operating on one social media channel. During this you will learn a lot in terms of the hiring experience providing you follow what I have taught you in this FREE bonus module.

However, as you advance in your business journey, and you hire other A-Players make sure you create a sense of belonging to keep them motivated

Another way to apply this is have your **VISION, MISSION & PRINCIPLES** documents available and get your team members to read through them... so they know the exact goal you are looking to achieve and how they're contributing to help your clients!

Provide them with the necessary tools and resources to perform their tasks efficiently and establish clear communication channels for regular check-ins and feedback.

Recognize and celebrate their contributions publicly to affirm their value to the team.

Additionally, you can encourage social interactions through virtual team-building activities and informal chats to build rapport. Also offer opportunities for professional + skill development and ensure they have a clear path for growth within your organization.

Showing genuine **care** and **appreciation**, offering competitive compensation, and maintaining a supportive work environment will help them feel valued and determined to work harder and smarter for your company!

Great work... now we will quickly go over the last phase...

PHASE #3 - MCM Scaling - Ramping Up To 1000+ Organic Messages Per Day!

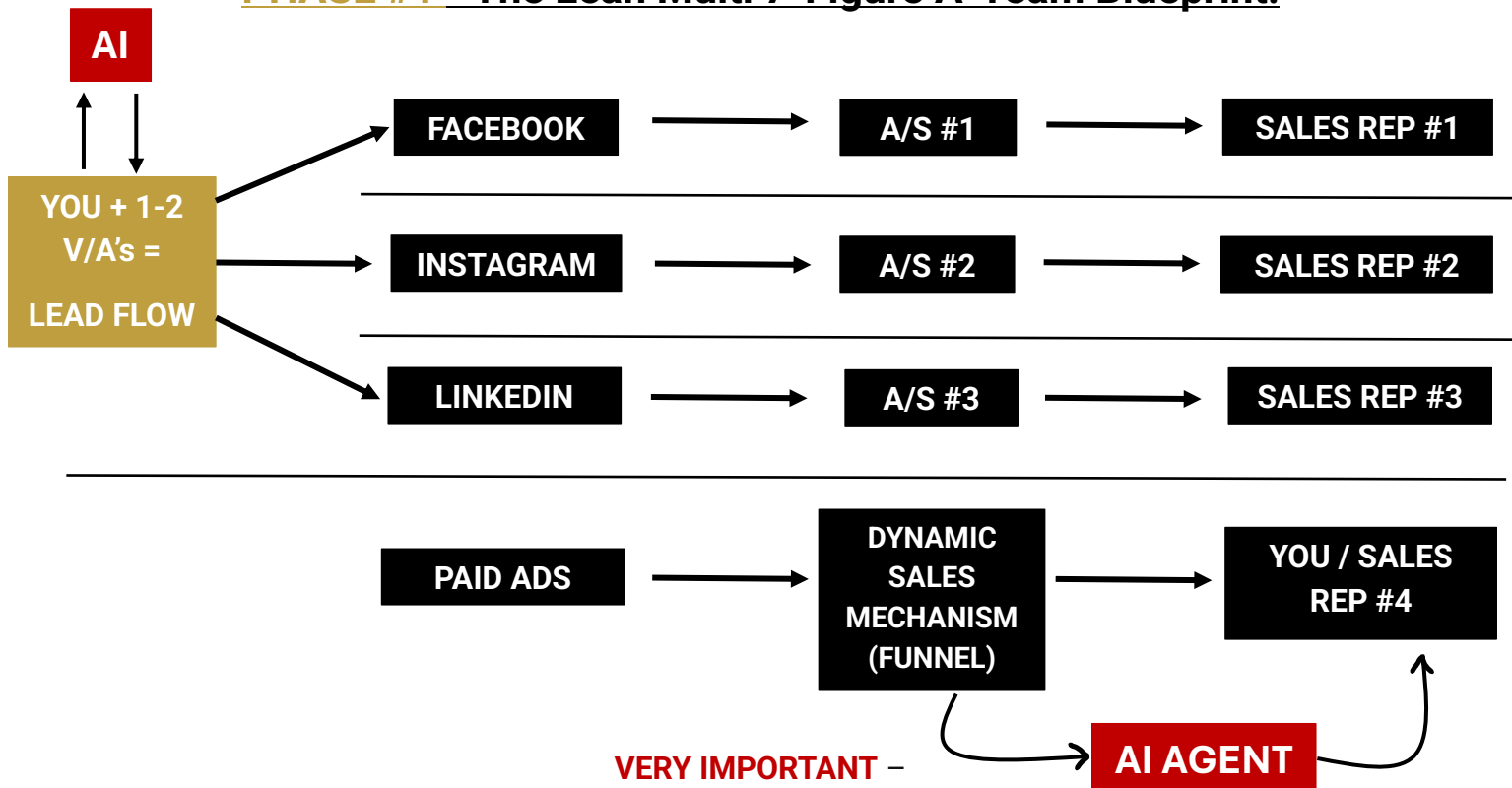
After you have implemented what I have just taught you in relation to hiring VIRTUAL ASSISTANTS to help you with LEAD FLOW + leveraged the first AI software tools called UpLead) to help you generate targeted leads. [Click Here To Start FREE TRIAL With Uplead](#)

And you've hired APPOINTMENT SETTERS to help you with BOOKING QUALIFIED APPOINTMENTS + FOLLOWING UP in the DM's inbox, the next constraint you'll have in your business is when you are hitting \$100,000 per month consistently.

This is where you need to replace yourself from selling over the phone...

Before you can do that, you need to ramp up your lead flow + outbound & inbound messages. You simply do that by following what I taught you in phase #1.

PHASE #1 - The Lean Multi 7-Figure A-Team Blueprint!



Start With ONE Social Media Channel That Your Target Market Is Primarily On, Optimize The Process Yourself, Hire A-Players Then DUPLICATE Onto The Next Social Media Channel If You Desire!

Once you have optimized 1 social media channel, in this example Facebook... by hiring a V.A. and an appointment setter, then I advise you to join UPLEAD so you can increase your lead flow + outreach messages.

By this point you should be making some decent profits... This is where I advise you to start taking a % of your profits & run paid ads into a funnel (*dynamic sales mechanism*)

At this point you'll also want to set up an AI AGENT using an API connected to your funnel or the social media account you are running ads on... to follow up for you and book calls on your calendar. (*Which we taught you how to do in the previous bonus module*)

(*If you're running DM ads link the API to your social media account PAGE*)

If you're struggling to do this... you can learn more about my DFY Funnel + Business Infrastructure coaching program and we will set all of this up for you)

Just shoot me a message on Facebook or LinkedIn and we can hop on a call.

Now, I advise you to stay selling on the phone until you hit \$100k per month.

After that it's time to hire your first sales rep (*which I will teach you how to do in the next section of this bonus module*)

Then you have the option to branch out and duplicate the process I've taught you inside this module onto Instagram & LinkedIn using outbound and inbound DM's. (*If you desire to scale*) If you're going to use LinkedIn, you can join LinkedIn Sales Navigator to help you find targeted leads. [Click Here To Get Started With LinkedIn Sales Navigator](#)

This is how you SCALE to 1000+ outbound + inbound messages per day using...

MCM = Multi Channel Marketing!



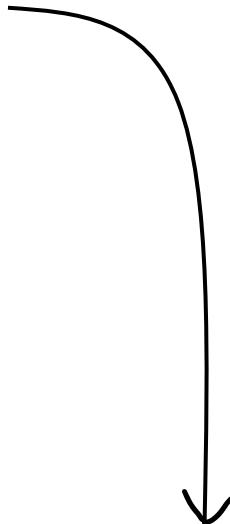
QUICK NOTE: You can get to 7-Figures in revenue by following this process on just ONE social media channel + paid ads!

What I am sharing with you here is a blueprint to help you get to multi-7-figures or even 8-Figures if you implement all the channels by hiring VA'S, setters and sales closers, however its done in stages... not all at once.

FOCUS ON ONE SOCIAL MEDIA CHANNEL TO START WITH, OPTIMIZE, ITERATE AND DEVELOP AS YOU GROW!

Fantastic work. That's the end of phase #3.

Let's now quickly go over the...





Hiring Appointment Setters Protocol

ACTION STEPS



ACTION STEP #1 – Hire Your First A.S By Following The Appointment Setter Hiring Protocol!

- ✓ **When You Get To \$20,000 Per Month & Have Consistent LEAD FLOW Then It's Time To Hire Your First Appointment Setter?** *(Refer To Page 31)*
- ✓ **Deeply Understand What You're Looking For When Hiring An A-Player Appointment Setter & Write Your A.S Job Description Using The Chat GPT Prompt!** *(Refer To Page 33)*
- ✓ **Find A-Player Appointment Setters Using The 5 Gold Mines!** *(Refer To Page 33)*

To Fast Track Your Success Use One of The DONE FOR YOU Agencies I Talked About To Find The Best Appointment Setters Who Are Already Fully Trained On Booking Calls!

- ✓ **Create Your Appointment Setter D.A.O Method Workflow Kit = SOP's (Standard Operating Procedures!) You Can Create a Page Using Your Sales Funnel Software & Add The Following Onto The Page Then Share The Link With Your Appointment Setter**

Appointment Setters Work Kit - SOP

- Team Work Kit Document Which Must Include *(Calendar Link, Offer Link, Strategical Content Links, Social Media Account Login Info, Client Testimonials Website / Funnel Link)*
- Core Client Avatar Document So They Can Understand The Pains, Problems, Dreams, Goals & Desires of Your Target Market + How To Communicate Effectively With Your Leads To Build Relationships & Increase Trust.
- (M.D.I.O) Offer Document So They Can Understand Your Offer Including Benefits, Features, Advantages + U.M *(Unique Mechanism)*
- Messaging Script + Video Examples of Successful Conversations That Lead To An Appointment Booked On Your Calendar.
- Appointment Setter Daily KPI's *(Key Performance Indicators)* So They Understand The Daily Targets They Need To Hit.
- Daily Reporting (S.O.D.R = Start Of Day Report) (E.O.D.R = End Of Day Report) – Use Google Sheets.

(Refer To Page 44)

- ✓ **Create Your Appointment Setter Job Ad By Modelling My Ad!** *(Refer To Page 44 + 45)*
- ✓ **Start Building Your Database of Appointment Setters Using The Spreadsheet Template I Gave You!** *(Refer To Page 46)*

- ✓ **When You Have a List of 20 – 30+ Potential Appointment Setters In Your Database... Begin The A/S Interview Process, Screening + Trial!** (Refer To Page 47)

You'll want to continue building this list of potential A-Player appointment setters so if one decides to quit... you can go to your database and quickly hire a new one, without too much disruption in your business in terms of booking new sales calls on your calendar.

Aim to build a list of 50 – 100+ candidates over time

Start interviewing potential candidates using the framework I gave you on page 47 and put them on a 2-week trial.

- ✓ **Onboard Your New Appointment Setter & Get Them Started In Your Business!**

Remember... A-Player Appointment Setters Can Get Up To Speed Within a 2-4 Weeks... Beginner / Intermediate Appointment Setters Take 6-8 Weeks (Refer To Page 52)

- ✓ **Develop Your A/S Performance Tracking Report Using Google Sheets By Giving Your Appointment Setter Access As Editor So They Can Update The Spreadsheet Daily + Understand The Firing Protocol!** (Refer To Page 56)

- ✓ **Make Your VA's, Appointments Setters & Sales Reps Feel Part of The Team & Look After Them!** (Refer To Page 58)

- ✓ **When You've Optimized One Social Media Channel... Look To Start Running Paid Ads And Duplicate The A.S Hiring Protocol... On Another Social Media Channel Using MCM = Multi Channel Marketing & Start Ramping Up To 1000+ Outbound & Inbound Messages Per Day** (Refer To Page 59)

Awesome!

That's the end of... **Hiring Proven V/A's & Appointment Setters So You Can Free Up Your Time & SCALE!**

In the last section of this module, I will share the process so you can hire your first SALES REP when you hit \$100k/Month, which will allow you to focus on H.L.A (High Leverage Activities) & live a life of more time & location **FREEDOM!** 😊

Hope you enjoyed this training and got value, see you in the next section and remember to take **MASSIVE ACTION!** Nothing happens without action!

Go hire your first appoint setter. It will do wonders for your business, when you get the right person in place and that can book your calendar full with qualified calls.

Talk soon!

Appreciate you!

Sam Malsom 😊

Founder & CEO: <https://www.onlinewealthsociety.com/>

