Calendly + 30 MINUTES TO PRESIDENT'S CLUB

Templates & scripts for every sales meeting

What's going on folks?! It's Armand crashing the Calendly party.

As a rep, no matter how full your current pipeline is, you have to keep taking meetings and stay organized with ongoing sales cycles.

The repeated steps that you'll keep running into?

1 Book the Meeting

2 Prep & Agenda

3 Recap & Next Steps

We'll be hitting best practices to keep you ahead of your key meetings throughout the sales cycle:

1 **Initial contact:** Increase your chances of booking the first call, whether inbound or outbound.

2 **Discovery:** Avoid rebooking a call by sending out the agenda before the call and utilize the champ sandwich to further solidify your chances.

3 **Demo:** Clue in the group on the agenda and make sure to book next steps live.

4 **Technical call & closing:** Work with your Sales Engineer to go through technicals, and utilize a JEP to close the deal.
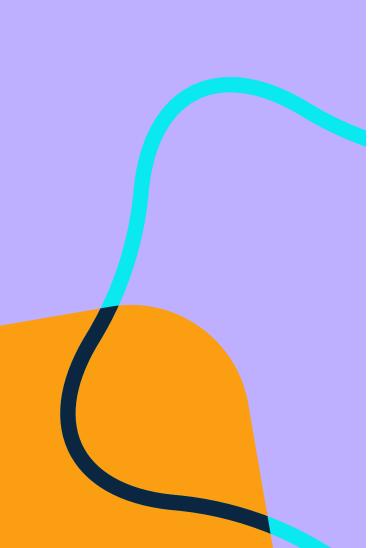
Let's get after it!

About Calendly

Calendly elevates every point in your sales cycle to impress prospects and drive more revenue. We support you at the beginning to convert leads into revenue opportunities and fill your pipeline faster. We help you move opportunities forward by scheduling every meeting with every prospect you need. Our automated pre- and post-meeting notifications also mean you stay memorable to reduce no-shows and increase interest. Our mission is helping you achieve your ultimate goal — to win more deals and build relationships to keep growing revenue.

Initial contact

Increase your chances for both inbound & outbound leads

Book The Meeting: Inbound Lead

When folks are coming inbound, it's a good sign they're interested in learning more about your solution. You're incentivized to make it as easy as possible to book a time with you. Help reduce the barrier for the prospect by including a Booking Link.

Email Template	Example
Hey **{first name}**, Thanks for **{Inbound lead source}**, I hope you found it useful! Typically, folks who **{insert action}** do so because of **{insight/problem}**. Open for a quick chat to see if we can help? If it's easier, feel free to grab a time here. Cheers,	Hey Jane, Thanks for downloading the **Smooth Selling Ebook**; I hope you found it useful! Typically, folks who download this asset are not setting up meetings with prospects as fast as they would like. Open for a quick chat to see if we can help? If it's easier, feel free to grab a time via my booking link here. Cheers,

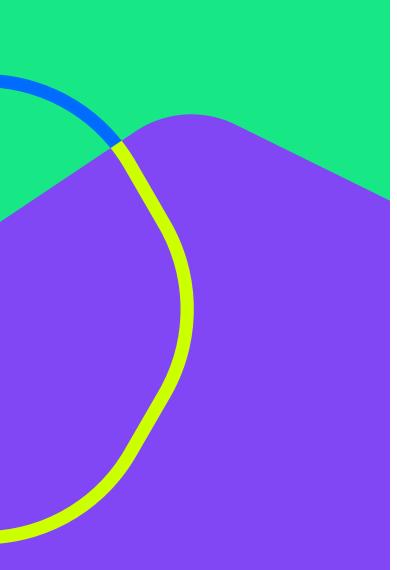## Book The Meeting: Outbound Lead

Your cold call is going well, here's how you can pivot from pitching to asking for a meeting.

Call Template	Why It Works
You: It's interesting you mention **{pain point}** – I don't want to assume but it sounds like we can be helpful. The reason why is because we **{how you address their problem}**. Interested in a longer conversation? **Them:** Let's do it. **You:** Great! How's the same time next week?	✓ Only pitch your solution once they've agreed to the problem ✓ Tie your solution to their problem ✓ Lower the barrier by suggesting a time for the prospect up front, then book it using Calendly on the call

Discovery

Preface & recap the disco call

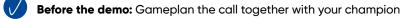| Prep & Agenda: Meeting Confirmation	
Congrats on booking the meeting! Now, the next step is to ensure prospects feel incentivized to show up to the initial discovery call. By providing a clear agenda, they'll feel looped in and (hopefully) less likely to ghost you.	
Email Template	**Example**
{first name} – Excited to chat tomorrow! Ahead of tomorrow's call, I want to share the agenda with you. Purpose: **{XYZ}** Plan: **{XYZ}** Outcome: **{XYZ}** If something comes up, feel free to reschedule using this link here. Cheers,	Belle – Excited to chat tomorrow! Ahead of tomorrow's call, I want to share the agenda with you. **Purpose:** Learn more about your current state & what you want to achieve **Plan:** Brief demo of Calendly **Outcome:** Understand if it makes sense to schedule a deep dive demo with the team If something comes up, feel free to reschedule using this link here. Cheers,

Recap & Next Steps: JEP's & Champ Sandwich

Now that you've booked the big demo with the team, introducing a JEP is a great way to manage deals and begin the multithreading process. You might even utilize a Champ Sandwich on this one.

Club Pro Tip: The Champ Sandwich

✓ **Before the demo:** Gameplan the call together with your champion

✓ **After the demo:** Debrief with your champion to get insider feedback

Email Template	Example
{first name} – Great chatting with you today! Excited to move things forward with the rest of the team. That being said, here's what we discussed as the next steps: • [MM/DD] {task 1} • [MM/DD] {task 2} • [MM/DD] {task 3} Typically, we've found it successful to schedule 15 minutes before the demo to work on a game plan. If you think that makes sense, feel free to book a time here. Aside from that, anything I missed from above? Cheers,	Jim – Great chatting with you today! Excited to move things forward with the rest of the team. That being said, here's what we discussed as the next steps: • [MM/DD] Demo with your Head of Sales, James. Goal: Align on a strategy for global revenue predictability. • [MM/DD] Vendor Review Kickoff: Finalize legal & security review. • [MM/DD] Proposal Review: Discuss commercial terms and rollout plan. Typically, we've found it successful to schedule 15 minutes right before the demo to work on a game plan. If you think that makes sense, feel free to book a time here. Aside from that, anything I missed from above? Cheers,

Demo

Confirm the demo & book the technical call.

Prep & Agenda: Meeting Confirmation

Similar to the previous section, make sure to include an agenda so the group knows what this call will be about.

Email Template	Example
Hey team – Excited to meet y'all tomorrow! Ahead of tomorrow's demo, I'd like to share the agenda with you. Purpose: **{XYZ}** Plan: **{XYZ}** Outcome: **{XYZ}** If something comes up, feel free to reschedule using this link here. Cheers,	Hey team – Excited to meet y'all tomorrow! Ahead of tomorrow's demo, I'd like to share the agenda with you. **Purpose:** Recap your current priorities **Plan:** Demo to address how we can help improve your current state **Outcome:** Understand if this is worth pursuing If something comes up, feel free to reschedule using this link here. Cheers,

Book the Meeting: Technical Call

While you have the right folks on the call, don't let the opportunity slip by, book the technical call!

Call Template	Why It Works
Glad to hear that you're interested in diving into the technicals, would love to get ahead of it and grab some time for the team to meet with my Sales Engineer. My guess is you'd want to get your Head of IT involved – I believe that's Terry? I have my calendar open now, how does next Tuesday look?	✓ Book your next meeting while the prospects are still on the call ✓ Utilize a Collective Event Type booking link to quickly identify availabilities for both you and your Sales Engineer ✓ Call out the specific person by name to show you've done your homework

Technical call & closing

Dive deep into the product with your sales engineer & close the deal

Prep & Agenda: Meeting Confirmation

As you're multithreading new folks in the deal, do 1:1 outreach with new stakeholders to ensure your bases are covered. In our example, check in with Terry to get his thoughts before the call.

Email Template	Example
Hey **{{first name}}** - Excited to meet with you tomorrow! Ahead of tomorrow's demo, I want to make sure we're covering everything important for you. Apart from discussing **{what's been agreed to on the previous call}**, is there anything else you'd like to include? Cheers,	Hey Terry - Excited to meet you tomorrow! Ahead of tomorrow's demo, I want to make sure we're covering everything important for you. Apart from discussing the security around integrations, is there anything else you'd like to include? Cheers,

Recap & Next Steps: Post Meeting

Confirm the success of the technical deep dive, and map the final steps to close out the deal.

Example	Why It Works
Will - We're thrilled to get your team started. Plan is to target go-live by 7/25. To do this, we'll need to get a signature by 6/15. Here's what we discussed live, with some important callouts for you. **Legal** • MM/DD (Armand): Provide order form, MSA, and DPA for legal review. • MM/DD (Will): Return first comments on the above. How's this looking? **Security** • MM/DD (Will): Share security questionnaire with the Calendly team. • MM/DD (Armand): Complete security questionnaire, provide SOC II report. Anything I missed?	Here's how to map out the steps to close: ✓ **Go-Live** / **Sign-Date First:** Start with their target signature date at the top. ✓ **Bucket and Bullet the Steps:** Take the major components of the path to signature, and categorize them by bucket. ✓ **Assign Owners and Dates:** Let no action go without an owner or due date.

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And that's a wrap!

Here's where you can get more of where that came from.

If you haven't already checked out **Calendly**...what are you waiting for?

Start speeding up your sales cycle so you can hit your number.