

## **Appointment Setting Specialist**

Successful, well-established, growth-oriented Financial Firm in Westbrook, CT seeks outgoing appointment setting specialists to join our growing Team. Candidates will be responsible for identifying and reaching out to clients and prospective clients on the phone and scheduling appointments for our sales reps, either in person or via telephone. If you're looking for unlimited earnings potential and you enjoy talking on the telephone and interacting with people, this may be the ideal position for you.

### **Responsibilities:**

- Ensure prospective client has a positive experience
- Encourage referrals through client interaction
- Attend educational workshops, seminars and bring-a-friend events
- Manage all inbound and outbound call volume, with the goal of setting appointments for our advisors
- Perform post-event follow-up activities with attendees and schedule appointments
- Make daily appointment confirmation calls to prospective clients
- Ensure prospective client information is entered into the CRM
- Manage and coordinate internal advisors' calendars with clients and prospective clients
- Master and carry-out prospecting phone calls for 60-70% of the day
- Undertake some technology driven growth generating programs
- Evaluate which appointments take priority over others to maximize revenue
- Field incoming phone calls and adapt 50% or more into appointments
- Track, assess and report the status of events and call metrics each day
- Use Microsoft Office Suite to manage various aspects of the job
- Demonstrate a pleasant disposition with each client and prospective client
- Eagerly explain services to potential clients when making appointments

### **Qualifications and Skill Set:**

- High school diploma required; some college, degree or equivalent work experience preferred
- Excellent time management and organization skills required
- Must have effective communication skills – both written and verbal
- Comfortable working independently with little supervision
- Advanced knowledge of Microsoft Office Suite desired
- Proficient with multiple calendar management
- Capable of multitasking while maintaining a positive attitude
- Talented in networking with existing and potential clients, both in person and by telephone
- Possess telephone greeting and presentation etiquette
- Maintain a pleasant speaking voice when engaging with prospective clients
- Experience and willingness working in a team environment
- Familiar with travel/event coordination, supply management and equipment maintenance

### **Benefits:**

- Health/Dental/Vision, Life Insurance, Short/Long term Disability, Paid time off, 401k

*The duties and responsibilities described in the above job description are not a comprehensive list. Additional tasks may be assigned to the employee from time to time; or the scope of the position may change as necessitated by company demands and/or industry standards.*