Sales Systems / Appointment Setting

Pre-call questions to determine if a prospect is worth booking a meeting with, saving time for both parties.

Difficulty: Intermediate

Model: GPT-4 / Claude / Gemini

Use Case: Lead Qualification, Appointment Filtering, Sales Efficiency

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Why This Prompt Exists

Most appointment setters book meetings with anyone who says “yes” — wasting sales reps’ time on bad fits.

You get:

- meetings with leads who have no budget
- demos for leads with no authority
- proposals for leads with no real need
- sales reps frustrated with unqualified meetings
- low conversion rates from meeting to opportunity

But qualification is not guesswork.

It is a few questions that save everyone time.

- Need: “What’s your biggest challenge with [problem area] right now?”
- Authority: “Who is typically involved in decisions about [solution type]?”
- Timeline: “When are you hoping to solve this?”
- Budget: “What range are you expecting to invest?”

Without pre-call qualification, you waste sales reps’ time.

This framework forces AI to create qualification questions that protect sales rep calendars.

The Prompt

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Assume the role of a sales development coach who protects sales reps'
time with good qualification.

Your task is to create appointment setting qualification questions.

Generate:

1. NEED/PAIN QUESTIONS (2-3 questions)
   - Open-ended, specific to problem you solve
   - Determines if they actually have the problem

2. AUTHORITY QUESTIONS (2-3 questions)
   - Who makes the decision
   - Who else is involved

3. TIMELINE QUESTIONS (2-3 questions)
   - When they need to solve this
   - What's driving the timeline

4. BUDGET QUESTIONS (2-3 questions)
   - Budget range (not exact number)
   - How they typically fund solutions

5. QUALIFICATION THRESHOLDS
   - Must-have answers to book meeting
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   - Disqualification criteria

6. QUALIFICATION SUMMARY (what to document in CRM)

INPUTS:

Your Product/Service:
[DESCRIBE]

Problem You Solve (one sentence):
[INSERT]

Minimum Deal Size (or budget range):
[INSERT $ OR "NONE"]

Typical Decision Maker Role:
[INSERT]

Typical Sales Cycle:
[WEEKS OR MONTHS]

RULES:
- Ask need/pain questions first (establishes relevance)
- Authority questions determine if they can buy
- Timeline questions determine urgency
- Budget questions determine affordability
- Set qualification thresholds (e.g., must have need + authority)
- Disqualify early (saves everyone time)

How To Use It

- Ask need/pain questions first (establishes relevance).
- Authority questions determine if they can buy.
- Timeline questions determine urgency.
- Set qualification thresholds (e.g., need + authority + timeline < 3 months).
- Disqualify early — don’t book meetings for bad fits.

Example Input

Your Product/Service: CRM automation software for sales teams

Problem You Solve: Sales reps waste 5+ hours/week manually entering data into CRM

Minimum Deal Size: $5,000/year

Typical Decision Maker Role: VP of Sales, Sales Operations Director

Typical Sales Cycle: 4-8 weeks

Why It Works
Most appointment setters waste sales reps’ time.

This framework improves outcomes by forcing:

- need/pain qualification (relevance)
- authority qualification (decision access)
- timeline qualification (urgency)
- budget qualification (affordability)
- disqualification thresholds (protection)

Great appointment setters don’t book every meeting — they book meetings that actually have a chance to close.

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