Sales Management and Organisation

Peter Green

IFC

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Peter Green

Consultant: Professor John Adair

The author

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Peter Green formed his own sales and management development consultancy in 1989. Previously, he had worked for J Bibby and the Hallmark Cards Group in sales, training and development, personnel and marketing services, up to European management and director level. One of the first Chartered Marketers, he is a past Chairman of the Sales Training Association, a Member of the Institute of Management, a Fellow of the Institute of Personnel and Development and an Investors in People advisor.

He has worked with a wide range of organisations in a variety of markets on both training and consultancy, including Filofax, Gibson Greetings International, Glaxo Wellcome, Palmer & Harvey and P&O. The common theme is to improve organisational performance through the development of people. This might be through training, or ensuring supportive business processes, linked to the needs of the people and the business.

A Course Director for the Chartered Institute of Marketing, he has recently had a book published by them on time management (*Managing Time: Loving Every Minute*, Chartered Institute of Marketing 1999). The contents of this Hawksmere book are based on the ideas and techniques which enabled him to be the first winner of a national sales management excellence award.

Preface

The aim of this book is to measurably improve sales force effectiveness.

A fundamental underlying premise, is that as well as explaining to salespeople and their managers **WHAT** we want them to do, we must also explain **WHY** and **HOW**. Consequently, the book is in three parts.

Part One covers the **WHY**: the underpinning Philosophy that influenced the approach and design.

Part Two covers the **WHAT**: a ten part Framework of how to organise and manage the modern sales team.

Part Three covers the **HOW**: a detailed System of measures and controls, designed to be adapted and tailored to the specific needs of individual organisations.

The system can be:

- paper-based, using a ready-to-use, off-the-shelf, A5 Filofax format
- paper-based, using adapted, in-house computer-produced format
- electronic, using one of the many computerised sales tracking systems
- a combination of computer and paper-based methods.

The book offers a set of criteria against which you can measure your existing sales system or any new system you design. New or old, does it help you to plan, record and monitor all calls on a territory, to both customers and prospects? Does it give you an overview of progress, help to diagnose problems and lead to more sales?

The award-winning techniques and ideas described here have already been of value to a variety of sales teams and organisations. I hope they prove of value to you.

Peter Green

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User's overview

This book has been written with the aim of providing a system of tools and techniques that will enable the sales manager or sales person to:

- Plan ahead for annual targets, key account development objectives, sales cycle objectives, the week's calls, the day's calls and tasks to do
- Record the outcome of each call with suggested objectives for the next visit
- Create an immediate overview of appointment schedules and gaps
- Create an immediate overview of each prospect's progress
- Self-diagnose strengths and areas for personal development by means of weekly and quarterly analysis of performance on relevant key ratios
- Measure personal performance against company norms and personal bests
- Obtain an objective, factual basis for performance appraisal, field accompaniment and development of each sales team member
- Handle all paperwork quickly, efficiently and effectively
- Put more into and get more out of all types of meetings
- Monitor the retention of profitable existing accounts
- Reduce travel costs through effective time and territory planning
- Monitor and develop across-the-range product selling.

This set of simple, practical, proven, award-winning techniques is based on: published and private research on the sales force needs; the successful performance management system developed by

Professor John Adair; a philosophy, a ten-point framework of time and territory management principles and a supporting system.

The system provides the following benefits:

- Demonstrable improvements in sales force cost-effectiveness from monitoring and managing selected key ratios
- Saves 'reinventing the wheel', with a ready-made, comprehensive and integrated system of best practice tools and techniques
- Flexibility allows tailoring of the system to the special needs of your company and industry
- Enables and empowers the sales force to monitor and manage their own performance
- Offers competitive advantage by providing the means to systematically develop the skills, confidence and competence of your sales force.

Learning styles

- If you learn best by understanding the background, thinking and ideas behind the system and how each part of the system interlinks, read the book from start to finish
- If you learn best by jumping in at the deep end, start at Part 3. This gets you immediately involved in the different parts of the system, has brief bullet-style notes and tells you where to find more detail if needed.

The illustrations in Part 3 are of pre-printed stationery produced by *Filofax*, but any of these forms could easily be produced in the office. For those who wish to use pre-printed stationery, details of how to contact *Filofax*, for their products and services, are provided at the end of this book.

'Everything requires time.
It is the only truly universal condition
All work takes place in time and uses up time
Yet most people take for granted
this unique, irreplaceable and necessary resource
Nothing else, perhaps, distinguishes effective executives
as much as their tender loving care of time.'

Peter Drucker • THE EFFECTIVE EXECUTIVE

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Introduction

Background

'The high cost of deploying sales people makes sales effectiveness a key business issue'

The need for this book has come from three sources:

1. Published research
2. Personal experience and observation of the changes and needs in various UK sales organisations during the nineties
3. Requests from clients.

Let us look first at the changing needs of UK sales organisations.

The salesperson has always been at the buyer-seller interface in the Marketing Mix.

Traditionally, the Marketing Mix consists of the 4 Ps of Product, Price, Place and Promotion, plus People, Processes and Physical Evidence if selling a service. But today's salesperson has been increasingly affected by the 4 Cs of:

1. Climate
The deep recession of the early nineties and the further threats of recession since.

2. Customers

More demanding customers, with higher expectations of service and margins.

3. Competitors

Often eroding profit, price and service differentials.

4. Culture

Companies often changing to flatter structures, with fewer managers and more responsibility passed down the organisation (de-layering and empowering in the nineties jargon).

From this we may conclude that the sales job of today is probably more challenging and more demanding than it has ever been. So companies are increasingly looking for ways to make their sales teams more effective. Research suggests training and sales systems are major factors.

The research story

According to research by the Business Advisory Bureau for the Sales Qualifications Board (SQB):

- British companies employ more than 400,000 salespeople
- During the early 1990s recession, the sales force size remained static, reflecting a recognition of the importance of sales
- Surveyed companies felt that 74 – 84 per cent of all revenue comes from salesperson activity.

However, selling costs are high. Based on figures from the SQB's 1995-96 Report *Towards a Qualified Salesforce*:

- The total below-the-line costs of keeping a salesperson on the road was £34,434

- Including management and other overheads, this rises to £49,560

- This is nearly three times the average basic salary

- The average cost per sales call across all industry sectors is £96 for salespeople and £180 for senior salespeople

- This is obviously lower in repeat consumer sectors and higher in capital equipment and service sectors.

The BAB research indicated that significant reductions in costs are possible by improving sales effectiveness by training and systems.

Earlier research of 174 UK companies by The Management Exchange Ltd for *Sales Direction* magazine had highlighted the skills needed by sales forces:

'Of all the skills listed in the survey question, the one where there is universal agreement is in **planning their time and priorities** *…*

… it was reported as the prime skill needed in the job now, the most common deficiency amongst existing sales people and newly recruited people and the most commonly perceived skill for which there will be a greater demand in the future.'

This book has therefore been designed to meet the needs of the sales team of the new millennium. It will help salespeople to plan their time cost-effectively and prioritise what needs to be done. It will help them, their managers and companies to identify, monitor and manage key sales results areas, so as to:

- **Increase productivity**
- **Increase profitable sales**
- **Reduce costs**
- **Grow the business** and
- **Develop the individual**.

part one

philosophy

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Part one
Philosophy

The importance of people

With competitors reducing or eliminating product, price and service differentials, companies are increasingly turning to the development of their people as one of the few ways left to build a competitive edge.

Look at some of the major initiatives we have seen in the last ten to fifteen years, all of which have the common threads of developing people and increasing their involvement in the business:

- Customer Service – 'Under-promise and over-deliver'
- Customer Care – 'The customer is king'
- Internal Customer Care – 'Colleagues as customers'
- Total Quality Management – 'Get it right first time, every time'
- ISO 9000 – 'Practical standards to give quality service to customers'
- Investors in People – 'National standard of best practice in managing people'
- National Vocational Qualifications (NVQs) and Scottish Vocational Qualifications (SVQs) – 'Based on workplace assessment of ability to do a job'
- Sales N/SVQs – 'Work-based qualifications for sales managers, salespeople and telesales'
- Customer Service N/SVQs – 'For internal staff with customer contact'
- Marketing N/SVQs – 'Identify, anticipate and satisfy customer needs at a profit'

- Management Charter Initiative – 'Nationally recognised qualifications for supervisors to senior managers'
- Empowering – 'Giving people the authority and means to make more decisions'
- De-layering – 'Flatter structures with fewer managers giving more responsibility to those left'.

So **you** are important to the future success of your company.

This book recognises this and provides simple, practical tools that will enable you to:

- Plan and monitor your own sales performance
- Develop your existing customers
- Track progress with prospective customers
- Manage your own professional development
- Master paperwork and administration
- Reduce stress and increase job satisfaction
- Save time and make more effective use of your time.

'… people are being recognised world-wide as the primary source of competitive advantage.'

Geoff Armstrong • DIRECTOR GENERAL,
INSTITUTE OF PERSONNEL AND DEVELOPMENT

What are you paid to do?

Professor John Adair outlined the responsibilities of all managers using his famous three circles model of:

- Achieving the **TASK**
- Building and maintaining the **TEAM**
- Motivating and developing the **INDIVIDUAL**.

We can adopt and adapt that model to show the responsibilities of each sales person as follows:

Achieving the **task**
*(eg sales targets
and objectives)*

Contributing
to the **team**
*(eg sales team,
company team)*

Developing their
individual sales skills
*(eg product knowledge,
sales skills)*
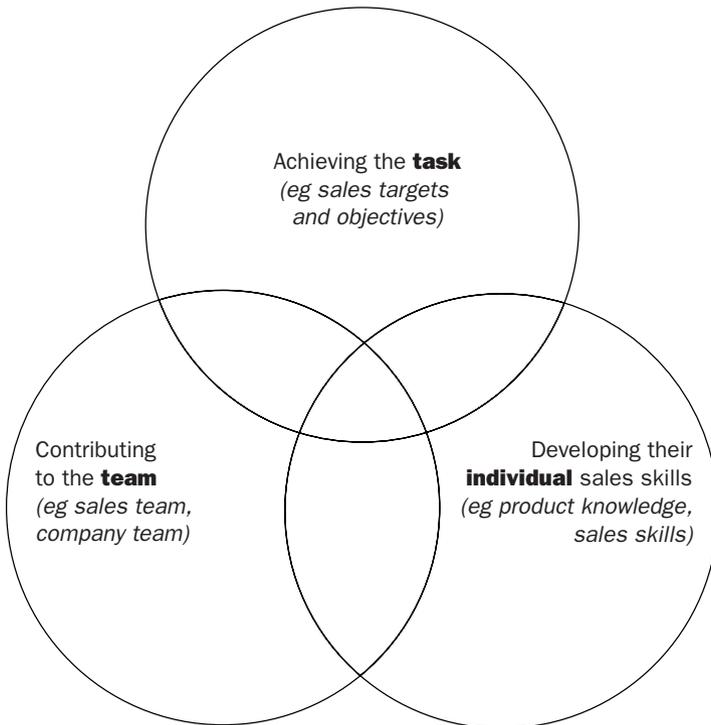
Figure 1: After John Adair's Action-centred Leadership Model

The three circles overlap, reminding us that if we over-emphasise any one of them, it will have an effect on the other two. For instance,

you obviously need to achieve your sales targets. But increasingly important, in the age of Customer Care, Quality Programmes and Supply Chains, is the need to fully contribute to all the teams to which you belong, eg your sales team, the office support team, other departments and the total company team.

And if you achieve your sales targets and objectives, help your teams but fail to improve your knowledge and skills, how long will you survive in this fast-changing world?

So the philosophy is that all three circles need appropriate attention.

However, our attention now switches to some of your philosophies…

Your philosophy checklist

Decide whether you mainly agree or mainly disagree with the following views or philosophies:

1. Whilst my sales manager needs to know how I am performing, I should be given the tools and the encouragement to plan, organise and control my own sales performance to agreed standards.

2. In today's business world, sales managers will get more from their staff if they **A.G.R.E.E**:

    *   **A** gree targets and objectives whenever possible, rather than impose

    *   **G** ive time and help to each of their people

    *   **R** eview progress on a regular basis

    *   **E** mpower sales people to act on their own initiative within agreed guidelines

    *   **E** ncourage by recognition, motivation and helping them to learn from mistakes.

3. I need to keep aiming for the right balance between work, home and social commitments.

4. To motivate today's salespeople, sales managers need to treat them like seven Rolls Royces! (VII RR):

   - **V** alued – the 'feel good' factor
   - **I** nvolved in the business as much as possible
   - **I** nformed regularly on People, Policies, Performance and Points that interest them
   - **R** ewarded fairly related to achievement and the financial means of the company
   - **R** ecognised with thanks and 'by catching them doing something right'.

5. People are best developed by using comprehensive, job-related checklists rather than by piecemeal or 'top of head' methods.

6. The best sales systems should follow the KISS principle – Keep It Short and Simple!

7. I need to take an important share of the responsibility for managing my own career and personal development.

Philosophy review

The more statements you agreed with, the closer you are to the beliefs which shaped the sales management system described in this book.

However, looking back through all these philosophies, you will find they all need time. And time is something we often seem short of!

Well fear not, for The Good News is that this system is designed to help you prioritise what needs to be done and make the best use of your time. It aims to help you be both more efficient and more effective.

Efficient – Doing things right

Effective – Doing the right things

To help with all this there is a framework of ten time management principles especially relevant to the sales world of today. So read on!

part two
framework

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The sales management ten-point plan

1. Agree targets and objectives

2. Organise appointments and travelling

3. Plan and prioritise daily

4. Develop existing customers

5. Find profitable new customers

6. Know your products and markets

7. Monitor and manage your performance

8. Master your paperwork

9. Get more from meetings

10. Manage your own development

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Agree targets and objectives

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The big picture

'If you don't know where you are going, you are likely to end up some place else!'

Robert F. Mager

Why does your company exist? What is its purpose?

Why does your job exist? Why do you do what you do?

Hopefully you are able to answer all these questions. Hopefully your company has a Mission Statement or something similar which explains why it is in business, and perhaps a set of values to explain how it will conduct that business. Hopefully you can also explain how your sales role plays its part in helping the company achieve its Mission or Aim.

Figure 2 overleaf shows how this operates in many companies with a link from the Big Corporate Vision to how each individual plans each day. It is this linking mechanism that your sales management system should provide.

Corporate mission

Business plan

Sales people's key areas

Sales targets and other objectives

Action plans

Prioritising the day

Maintaining and building the business

Performance appraisal

Training needs

Figure 2: The sales vision to action cycle

You will see a reference in the chart to key areas. These are the main areas of your job from which to get results.

Although you are free to change them, we believe that you will find that the seven headings we have pre-selected will serve you well.

These sales key areas are:

1. Communications

2. Customers

3. Call planning

4. Prospects

5. Product and market information

6. Performance control

7. Personal development.

We will see how these key areas can help you as we progress through the rest of Part 2.

Professional pride

As everyone knows, without an effective sales force there are fewer orders, fewer jobs, less profit and eventually no company.

Based on *The Costs and Effectiveness of Sales Forces in Britain*, a report produced for the Sales Qualifications Board, over three quarters of UK company revenue comes directly from sales force activity.

So selling makes a major contribution to the economy of this country and sales is a profession to be proud of. Like any profession it requires certain disciplines. And two disciplines which can have a major impact on a company's profitability are sales forecasting and targeting.

Sales forecasting

Anyone can forecast. But it takes a professional to forecast accurately.

And accuracy is important because sales forecasts can have an impact on such things as:

- The number of people employed
- Office, factory and warehouse space obtained
- Raw material or equipment purchased etc.

Under-cook the forecast and you have not got the resources to meet the orders. Result: frustration, demotivation and reduced profits.

Over-cook the forecast and you have under-used resources standing idle. Result: pressure on the sales force, frustration and reduced profits.

For many companies, an important element in this forecasting is sales force input. Notes made on customer record cards (see Chapter 4) during the year to help you make individual customer forecasts will prove invaluable in this.

A simple technique to help you is the Mini-Max technique. What are the minimum sales likely from a customer – the worst scenario? What are the maximum sales possible from a customer – the dream scenario? You can then forecast somewhere between these extremes, leaning more to the minimum or maximum according to your knowledge of their business and related factors.

Sales National/Scottish Vocational Qualification

To achieve a full award a candidate must complete all seven mandatory units plus three optional units, making a total of ten units.

Mandatory Units

1. Forecast, monitor and evaluate own performance in achieving sales targets

2. Design, implement and evaluate sales plans

3. Manage yourself

4. Create and maintain effective sales relationships

5. Generate and follow up sales leads

6. Sell products and services to customers in face-to-face meetings

7. Solve problems on behalf of customers.

Extract from the Sales N/SVQ (Revised 1999).

Targeting

Research shows that over 93 per cent of large UK firms consider sales targets to be essential.

> **A good sales target is challenging but attainable.**
>
> **A better sales target is challenging, attainable and seen to be so by the salesforce.**

Getting acceptance and commitment to sales targets is much easier with some form of sales force involvement. Many companies operate a 'bottom up – top down' method where sales manager and sales people compare figures based on agreed criteria such as last year's volume, inflation, price increases, new products in the pipeline, new business, and market conditions.

This system works very well, as does the idea of splitting big targets down into individual targets for each customer, especially big customers. The benefits to you as a salesperson are that not only can you see what business you have to bring in, you can also see where you are most likely to find it.

As well as the overall annual sales target, many companies have promotional or short-term sales targets on specific products or services. Indeed, some companies have so many sales targets that sales people can sometimes be confused as to what they are supposed to be selling.

Remember:

When everything is a priority, nothing is a priority!

To help overcome this problem and focus on priorities, it is useful to list your sales targets and priorities each month, and make sure that this information is in front of you each day, making it hard to forget!

Setting objectives

As well as various sales targets, you may also have some objectives, eg to produce a report on a competitor, to book and organise a trade show or to improve relations with a particular department.

However, some people's objectives are little more than 'wish lists'! They are statements of intent but often fail to happen. To consistently achieve what you hope to achieve, you need:

1.   A written specific objective

2.   An action plan

3.   The knowledge and motivation to carry it out.

Written objectives need to be **S.M.A.R.T.E.R**:

- •   **S**   pecific – not vague
- •   **M** easurable in some way
- •   **A**   greed as attainable
- •   **R**   ealistic but challenging
- •   **T**   imed – with an 'achieve by' date
- •   **E**   valuated – with success criteria
- •   **R**   eviewed – at agreed intervals.

Take a look at the following examples:

Objective 1

To increase sales

Is this a S.M.A.R.T.E.R objective?

Not at all. Increase sales of what – all products or some products? Increase by what amount? By when?

Objective 2

To increase last year's sales of car care products to national accounts in the oil sector by at least 12 per cent sterling by the end of the year within the Northern Region.

Is this a S.M.A.R.T.E.R objective?

This is much more specific and a big improvement. A useful way of checking your objectives is to use the Colleague Test. If a colleague finds it **S.M.A.R.T.E.R**, clear and understandable, use it. If not, amend it and test it again.

Personal checklist

1. Does the company have a Mission Statement?
2. If so, do I know how my job can help to achieve it?
3. Do I know all my sales targets?
4. Have I agreed other objectives with my manager?
5. Do I need to clarify anything with my manager?

Organise appointments and travelling

2

Six ways to make the best use of your time by planning and managing your sales area are:

- Know how you spend your time
- Make appointments
- Call at the right frequency
- Have a geographic journey plan
- Use the 'petal call plan' system
- Keep a visual overview of calls, prospects and appointments.

Know how to spend your time

Are you absolutely sure that you are making the best possible use of your precious, valuable and expensive time? Do you know how you spend your time? One way to find out and be sure is to complete a Time Log.

HEALTH WARNING — Time logs are not to be undertaken by the fainthearted. The difference between what we think we do and what we actually do can be a considerable shock!

Time log method

1. At the end of each hour, record how the previous hour was spent, either to the nearest quarter hour or by the exact number of minutes.

2. At the end of the day, summarise the time spent under the eight or nine most suitable headings, of which the following will give you some ideas:

   - Administration
   - Call preparation/post-call records
   - Demonstrations
   - Entertaining
   - Face-to-face selling/influencing/negotiating
   - Internal meetings and training courses
   - Lunch/coffee breaks
   - Making appointments
   - Merchandising
   - Parking/travelling

- •   Proposals/quotations
- •   Prospecting
- •   Waiting.

3.   After a few days, start to draw some conclusions:

- •   Are you spending enough time on the important things?
- •   Where can you save time?
- •   How can you make better use of your time?

Make appointments

Long gone are the days when you could pop into a call and say 'Well I was just passing…'

Such actions imply that:

- •   You have nothing else to do
- •   You do not respect the buyer's time
- •   You have nothing specific to say
- •   You are a potential time waster.

Most companies will now only see people by appointment. So always make appointments so that you will *be expected*. Whilst not guaranteeing an order, appointments do imply interest and substantially increase your chances of getting an order.

Where to record appointments

There are several options:

1. A dated day planner – **not recommended** because:

   - You do not get a visual overview of all your appointments

   - You need to carry two to three months dated day plans to make it work.

2. A monthly overview – **recommended** because:

   - You do get an at-a-glance visual overview of your appointments for the month

   - You can conveniently carry several monthly overviews at a time (we recommend at least six months in advance at all times).

3. A diary – recommended as a **satellite system** because:

   - There are times when you only have your diary rather than all your documentation, eg when taking a client to dinner or on personal, social occasions. (Always transfer appointments onto your monthly overview afterwards to avoid having two lists!)

Pocket diary addicts who cannot kick the habit could use a diary without the monthly overviews. However, we believe that **a monthly overview is the best option** because it should have:

- Double the space of a month-to-view pocket diary

- The same space and double the overview of a two-weeks-to-view pocket diary

- Four times the overview of a week-to-view pocket diary.

Call at the right frequency

All customers and prospective customers should be called on at the most cost-effective frequency. This is normally related to their volume of business or potential business with you.

Your customer record cards (see Chapter 4) should have space to record the call frequency, based on your own company criteria and codes. For example:

Criteria, eg targeted or potential annual business	Frequency code	
20,000 + units	Weekly calls	W
10-20,000	Fortnightly	F
5-10,000	Monthly	M
3-5,000	Six weekly	S
1-3,000	Eight weekly	E
Less than 1,000	Quarterly	Q

Now agree your own codes and criteria if you have not already done so.

Have a journey plan

Various surveys across all UK industry types suggest that the number of calls per salesperson per day averages four to five, with twice this number in repeat consumer product companies.

To minimise miles per call and maximise productivity, a sound, cost-effective journey plan is essential for the vast majority of sales teams.

If you do not have a journey plan, we will briefly describe how to make one. If you already have one, just satisfy yourself that it meets the following common criteria:

Does your journey plan:

- Enable you to call on different customers at different call frequencies?

- Ensure that you are in each main sector of your territory at least once per week in order to handle emergencies?

- Allow for any seasonal variations in order patterns?

- Enable prospect calls to be fitted in with existing calls?

- Use the 'petal call plan system', when applicable, to minimise mileage, ie you travel out in the morning, are at your furthest place by lunch time and travel back towards home in the afternoon, following a petal-like shape?

- Make it easy to plan in sales meetings, courses, exhibitions and holidays?

- Help you to minimise your miles per call and miles per order?

If you could answer 'yes' to all seven questions, skip this next section.

How to create a journey plan

1. **Call frequencies** – establish call frequencies as described earlier in this chapter.

2. **Section territory** – divide your territory map into four sections, with roughly equal monthly call workloads.

3. **Subsection territory** – split each of the four sections into geographic subsections based on a town or other specific area. Label these subsections A1, A2, A3, B1, B2 etc.

4. **Plan journey cycle** – aim to be in each section of the terri-
    tory at least once a week. This helps to reduce time-consuming
    emergency calls as you will be in each major part of your
    territory each week. For example:

    Week 1: Mon A1   Tue B1   Wed C1   Thu D1   Fri A2

    Week 2: Mon B2   Tue C2   Wed D2   Thu A3   Fri B3

    Week 3: Mon C3   Tue D3   Wed A4   Thu B4   Fri C4

                                                    etc

5. **Make appointments to fit journey plan** – on your monthly
    overview or diary, write in the subsection or town you will
    be in each day. For example:

    Mon: A1 – Bury

    Tue: B1 – Wigan

    Wed: C1 – Chorley

    Thu: D1 – Southport

    Fri: A2 – Bolton etc

Thereafter, rather than offer a customer a free choice of days for appoint-
ments, you can offer specific days, eg 'I'm in Southport on the Thursday,
can we fix a time then?' In practice this works very well. It can dramat-
ically reduce mileage and attendant costs as well as enable extra calls
to be made.

For salespeople with very large territories, journey planning is even
more important to prevent long wasted journeys and excessive mileage
costs.

Use the petal call plan system

With several calls to make on a single day, there are three main options:

1. Call haphazardly

2. Drive to the furthest call, zig-zag back and end up close to home

3. Start at one of the nearest calls and travel to be furthest away at midday. Then complete the other calls to end up close to home

Option three is best because it results in:

- Fewest miles travelled

- Shortest drive distance to start the day

- Shortest drive to end the day.

Because of its shape it is often called the 'petal system' and is recommended whenever it is feasible.

In one experiment, using pins and cotton on a territory map, a salesperson found that:

- The **haphazard system** actually used covered   179 miles   1.96:1.00

- The **zigzag system** would have covered   144 miles   1.58:1.00

- The **petal system** would have covered   91 miles   1.00:1.00

So driving around a territory in an unplanned way can double your mileage!

Territory exercise

Check out some of your days with map pins and cotton. See if there is time and money to be saved!

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Plan and prioritise daily

3

The options

There are six main methods of planning and prioritising your day:

1. The headless chicken method
2. The headless tortoise method
3. The fire brigade method
4. The decibel method
5. Your present method
6. The sales management system described in this book

1. The headless chicken method

The beauty of this method is that you don't have to plan. Simply turn up in the sales office or sit at home and the day will take care of itself. The phone will ring, the post will come, a customer will need a call, there will be a problem to solve, some cash to collect, a prospect to see, the boss to avoid, a report to fill in, a memo to write – I mean who needs planning? By dashing from one thing to the next you can look important and fill every minute.

2. The headless tortoise method

This is the same as the headless chicken method in that it is reactive not proactive, but it is done at a much slower pace.

3. The fire brigade method

Proponents of this method can be seen rushing around at amazing speeds wearing yellow helmets. They only work on emergencies and crises, make a lot of noise and drink adrenaline.

4. The decibel method

This method is based on responding to whoever shouts loudest or spoke to them last and has the reactive element in common with the preceding approaches.

Unfortunately there are a lot of supporters around of the above methods, which is why the 174 companies in the survey mentioned in Part 1 listed poor time management and identification of priorities as the main skill deficiency in their salesforces. These companies recognised that there will be an increasing need for these skills in the future.

5. Your present method

Fortunately, your own method of planning and prioritising is much superior to methods one to four. You and your colleagues who do plan and prioritise professionally will therefore find the next method very much to your taste.

6. The sales management system described in this book

The preferred choice! Let us look at this in detail.

Daily plans

If you use a double page spread to plan each day, you will be able to:

- List all your appointments for the day from your monthly overview or satellite diary

- Make notes of reminders opposite these

- List all other jobs to do

- List people to contact

- List work passed to or from others

- From your monthly overview, identify any sales targets, objectives or deadlines for action today

- Prioritise which jobs to tackle first

- Note any incidental expenses incurred, eg parking

- Include personal and domestic jobs to do as well as business ones

- Add things to the list as they occur in the day

> # Yesterday you planned for Tomorrow.
>
> # Today you must make Tomorrow happen.

Used in conjunction with a monthly overview, a daily plan links together the short-term needs of today with the longer term needs of tomorrow:

- Helps you work on the important, not just the urgent

- Helps you achieve more, and gives the satisfaction of ticking off jobs accomplished

- Creates a sound, proven, logical basis for planning your work
- Provides greater help to customers and colleagues by making you more efficient and preventing you forgetting things
- Meets the needs of different sales people in different industries
- Reduces stress by having everything written down in one place and by having an overview of this produced from your day planners

---

The 10/10 principle

10 minutes spent planning the day will give you at least 10 per cent more productivity.

So much for the features and benefits – we now move on to the mechanics…

How to do a daily plan

1. Write down today's appointments
   - Put them against the appropriate time
   - See Chapter 2 to find out how to keep an overview of appointments
2. Carry forward uncompleted tasks from yesterday
   - Put them on your day planner under 'To do', 'To contact' headings etc, as appropriate

3. Add any monthly targets, tasks or objectives which need action today

- Get these from your monthly overview
- Add them to the 'To do' list

4. Check the Action Now section of your Paperwork Organiser

- (We will cover this more fully in Chapter 8 – Master your paperwork)

5. Add personal items

- For example: 'Buy anniversary card', 'Book squash court'
- Writing everything down in one place reduces stress!

6. Add any other tasks you can think of that need attention

- Add others at any time during the day as they occur

Now that we have a 'To do' list including appointments, we come to our Guarantee…

GUARANTEE

Even with a sales management system there will always be more things you would like to do in a day than you will have time for.

So you need to Prioritise.

How to prioritise

Faced with a list of jobs to do, some people go for those items which are simple or quick or fun to do. Their list can look good with lots of ticks on it but is this good time management? Probably not.

There are two very effective alternative methods of prioritising – the simple and the advanced.

For those days when you spend most of your time in the field seeing customers, the simple method will probably suffice, so we will describe that first.

Simple prioritising

1. Look at the list of jobs to do on your daily plan.

2. Number these in order of their importance.

3. In principle, work on number one until it is finished, then number two, then number three and so on.

4. In practice you may have to adjust this, eg if you estimate your first priority will take an hour and you only have ten minutes before your next call, you may choose something lower down your list that can be done in the time available.

5. Be flexible. You may have noticed that days do not always go as expected and so you may then have to re-prioritise!

Expect the unexpected.

Be flexible!

Advanced prioritising

This is especially useful for the more complex days when you have lots to do.

Figure 3: The urgent/important priority matrix

1. Categorise the work you have to do as A, B, C or D, as shown in the matrix – Figure 3.

    A – **Important and Urgent**, eg preparing a proposal for a customer. Do it now. Do it well.

    B – **Important but Not Urgent**, eg writing a report on a competitor. Plan quality time for it. Note that if Bs keep being postponed, eventually they will become As.

     C –   **Not Important but Urgent**, eg answering a request for information. Do it quickly. Fit it in when you have a few spare minutes.

     D –   **Not Important and Not Urgent**, eg reading a mail shot. Delegate, discard or delay! Many of these tasks will fade away. The rest will become Cs.

2. Prioritise the As as A1, A2, A3 etc, based on their degree of urgency.

3. Do the same with the Bs and Cs.

4. Look at the time you have available between appointments, meetings etc and ensure that you start working on your A1 first, then your A2, A3 and so on.

5. Try and plan a good chunk of time, eg an hour or more, to work on any Bs you may have.

   Consider using the 'elephant technique', ie the only way to eat an elephant is a bite at a time. Think the same way about major B tasks. Split such tasks into bite-sized chunks spread over a period. Meanwhile keep your Bs in sight and in mind by writing them on your monthly overview along with the other objectives and targets for the month.

6. Fit in your Cs, starting with your C1, in the small pockets of time you find during the day, eg just before a meeting.

7. Expect the unexpected by not over-planning your day. Plan an absolute maximum of 75 per cent to be realistic.

With both the simple method and the advanced method, you will probably not finish your list of jobs to do. But you will have been working on what was most important. With practice, you will soon start to reap the benefits of these tried and tested approaches to time management.

When to plan the day

Do you plan the day the night before or first thing in the morning? Both methods have benefits.

Some people prefer to plan first thing in the morning because, in their case, they are at their best and freshest then.

On the other hand, planning the night before enables you to relax, to get off to a prompt start and to allow your unconscious mind to work whilst you sleep. This is the ideal and if you can do this, we recommend it.

More important than when you plan is that you do plan and preferably at the same time of the day to develop a routine.

Weekly plans

Many companies and successful sales people find it an excellent discipline to complete a weekly plan of the following week's calls and outline objectives or purpose. It helps to ensure that enough appointments are obtained in advance by highlighting any gaps. It also, once again, lets the unconscious brain get to work as you sleep.

Monthly plans

At the end of each month, write down your current sales targets, promotion targets etc.

Check through any objectives and action plans you have and see if there are any deadlines or milestones due this month. If so, record them with the target date on your monthly overview as well.

By keeping this overview folded into your daily dated plans, these medium-term objectives are kept in front of you each day as a constant reminder of what has to be achieved.

So now we have planned the month's objectives, the week in outline and the day in detail, let us see how we can use good time management to develop our existing customers.

Developing existing customers

4

Introduction

'There is increasing evidence that existing customers are far more profitable than new ones'

Mike Wilson, CHAIRMAN, MARKETING IMPROVEMENTS

Existing customers are increasingly seen as vitally important to company profitability. Let us look at ways to help you keep and develop your existing customers.

Existing customer health check

Ask yourself these questions:

1. Do you set yourself annual sales and financial targets for each customer, so that you know what you are trying to achieve?

2. Do you set yourself annual development objectives for your top customers with strategies on how you plan to achieve them?

3. Do you really understand the business of each of your customers, especially your major customers?

4. Do you regularly suggest innovative ways in which their business can develop by using your products and services, eg through quarterly business reviews?

Comment: Too many 'no's here and you could be left behind by competitors. More and more salesforces are shifting from a traditional straight selling role to a business development and advisory role. Yet how can you advise if you do not understand your customer's business?

Suggestion: Write up a plan for at least each of your top ten customers and develop objectives, strategies and an action plan to aim to retain and develop the business. Review progress regularly with your manager. Set up a system of customer record cards (see later in this chapter) to build up your customer knowledge.

'We should reward sales people for keeping customers rather than for finding new ones'

Professor Michael Thomas • STRATHCLYDE UNIVERSITY

A survey of UK Sales Managers revealed:
- **Excessive downward pressure on short-term sales**
- **Consequent failure to sell across the board**
- **Consequent lack of competitiveness and future growth.**

The Sales Direction Survey of Sales Management

Call objectives

1. Do you always check what you need to take into each call so as not to forget literature, samples, correspondence etc?

2. Do your sales objectives for each call include consideration of the size of order you will need in order to reach your annual target for this customer?

3. Do you consider information objectives for each call – points you want to find out about the business, the market, the competition or information that might interest or help the customer?

4. Do you regularly seek opportunities to develop your product range with each customer?

5. Do you consider before every call whether it is appropriate to take some development actions on this call, in order to achieve your longer-term development goals for this account?

6. Do you regularly sell concepts as well as products?

Comments: 'No's to questions one to three are basics which you can easily put right. 'No's to questions four to six are more serious and, where present, reflect problems that are widespread in UK sales forces.

Suggestion: Before each call, remember to plan:

> **D** evelopment objectives
>
> **I** nformation objectives
>
> **S** ales objectives and
>
> **C** heck that you have got all you need for the call.

Always remember to think long-term as well as short-term about your customers.

Unit Descriptor

Generate and follow up sales leads

This unit is an integral part of the sales cycle. It involves the individual in making the initial contact, through a variety of different methods, with potential sales leads and establishing their buying needs. It requires the individual to advise potential customers of any products and services they may be interested in and to take the opportunity to promote those products and services.

The unit also requires the individual to obtain and record information about the contact they have with customers, including their buying needs and any further action that is required and relevant information about other suppliers, and where a customer's interests suggest that there may be opportunity for up-selling or cross-selling in the future.

The individual is also required to establish a relationship with both cold and warm sales leads, by providing them with information and clarifying their buying requirements throughout the unit.

Extract from The Sales N/SVQ Level 3 (Revised 1999).

Call evaluation

1. Do you keep track of total business volume per customer?
2. Do you keep track of sales trends by product group for each customer?

3. Do you analyse each call for what you can learn from it?

4. Do you always make notes after each call on points that will help you on future calls, rather than rely on memory?

Comment: Some salespeople in other companies cannot see the wood for the computer print-out trees. Bombarded with data and pressed for sales today, they miss the overall volume trends in some of their customers. Others prefer action to analysis. They are the ones who end up not with 20 years' experience, but with one year's experience 20 times. Others cannot see the point of writing down call details for customers they know well and see often. 'Nor could I', said one salesperson, 'until my manager insisted that I did. I now see the value and do it by choice!'

Customer records

Set up a system of customer records which:

- Are either paper based or electronic*
- Have space for basic customer details, contacts etc
- Give an instant record of products used by the customer and those bought from you
- Provide ample space for call comments that will help in future, including ideas for next call objectives.

These will prove invaluable because they:

- Provide a means of tracking product groups
- Increase your professionalism in the customers' eyes by your consistent ability to start each sales call where you left off the last one
- Are easy to use, help you to sell more and develop the business.

* *Filofax* produce paper-based customer record cards. Several companies produce electronic sales record and business tracking systems.

Only one in ten of the UK's top 200 companies recorded how many customers they lost each year.

Nearly half conceded their salesforce were not fully equipped to meet the needs of their existing customers.

PRICE WATERHOUSE SURVEY

Customer retention and loyalty

1. Do you record the percentage of customers you lose each year?
2. Do you know how you compare with the UK average annual rate of loss of existing customers, which is 15-20 per cent?

Comment: A 'no' to these questions puts you in company with 90 per cent of UK firms. Research by Bain and Company quoted in the April 1994 Marketing Business suggests that:

- A retention rate of 80 per cent means that customers on average remain loyal for five years

- A retention rate of 90 per cent means that customers on average remain loyal for 10 years.

Whilst you will regularly need to weed out unprofitable accounts that you cannot afford to call on, or have serviced by telephone or by other means, it is obviously important to hold on to existing accounts.

Suggestion: Log the number of active accounts you have at the start and end of each quarter. This information should be available from company print-outs or from your customer record cards.

Be especially vigilant for any inactivity in the top 20 per cent of your accounts, who probably give you 80 per cent of your business.

Research has shown that boosting a company's customer retention rate by two per cent has the same effect on profits as cutting costs by ten per cent

Forrokh Suntook, Director • BUSINESS MARKETING SERVICE

Summary

And for the final word on the importance of your existing customers…

Customers are the lifeblood of business.

Without them our doors would close.

Don't ever forget it!

Professor Michael Thomas • STRATHCLYDE UNIVERSITY

Find profitable new customers

5

The need

<div style="border:1px solid #ccc; padding:1em;">

Prospecting and cost reductions

There are significant reductions in cost by improving conversion rates by training and systems.

Source: Sales Qualification Board (SQB) Survey

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In the previous chapter, we saw the importance of developing and retaining existing customers. The importance of finding new customers varies in different companies in different industries.

However, all businesses do need to open new accounts in order to replace the ones they will inevitably lose.

Question: How good at prospecting for new customers is the typical UK sales person?

Answer: Not very!

Evidence:

Prospecting problems

A cross-industry survey of salesforce behaviour and results found that:

1. Sales people were good at opening small accounts but not large ones

2. Too many calls and too much time were taken to clinch the sale

3. There were long prospect lists but few conversions.

Source: SQB Survey

Although we are confident that you personally do not fall into any of these categories, let us share some ideas which may be helpful to some of your colleagues…

New account criteria

To help upgrade the quality of new accounts opened, many companies find it helpful to establish minimum criteria to be met before an account can be opened.

Guidelines on these prospect criteria usually cover such things as:

- Minimum annual turnover

- Minimum number of employees

- Minimum size (eg space to stock your product or service your equipment)

- Minimum initial order value

- Acceptable credit rating

- Appropriate image (eg upmarket products not to be sold in downmarket sites)

- Potential business (eg competitors' sales levels)

- Acceptance of telesales servicing

- Delivery requirements

- Agreement to direct debit etc.

Criteria exercise

If you do not already have prospect criteria, try establishing a list of suitable guidelines with your sales manager and colleagues.

Stages in prospecting

Different companies go about getting their new customers in different ways, eg advertising in newspapers, magazines, direct mail, tailored lists, *Yellow Pages*, referrals from clients, cold calling and so on.

All these methods involve an investment of time, money and effort by the company. Prospective customers produced by them therefore needed to be treated as valuable company assets. You would not throw your own money away and yet some sales people are not able to keep track of the progress of each prospect.

A good solution is to create a paper or electronic prospect overview form, to give an immediate visual overview of anything up to 30 or 40 prospects.

On this prospect overview, you can track your progress by listing your prospects and recording activities against them using letter codes,

together with the dates these activities took place. These activities vary widely by industry and company and you will need to develop your own letter codes if they do not already exist. The table below should give you some ideas. You can then work out, with your sales manager and the team, what is appropriate for your company:

Code	Example definition
E	Enquiry
B	Brochure sent
Q	Qualified prospect
A	Appointment
I	Initial call
F	Follow-up call
D	Demonstration
S	Site visit
P	Proposal
O	Order

Tip: Beware of using a letter code more than once, eg 'I' for Initial call and 'I' for Installation.

Prospect information

In conjunction with your prospect overview form, it is also a good idea to set up a system of prospect records. These enable you to gradually build up a picture of the prospect, understand his needs and find ways of meeting them.

Like customer records, your prospect records, irrespective of format, should have space for basic customer details, contacts etc.

There should also be ample space for details of product potential, buying methods and competitive information and any other useful information gleaned from visits.

Suggestion: Get the right balance between too little and too much information. You need enough knowledge about a customer's business and needs to make a successful presentation. But too much information can lead to 'analysis paralysis', where every new piece of the jigsaw calls for still more pieces in an attempt to complete the full picture before making a proposal. This is a form of procrastination, so please beware!

If you really do need to collect a lot of information, eg for a major account, keep any additional sheets together with the prospect record card, if you use a paper system.

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Know your products and markets

6

Introduction

Product knowledge is arguably more important now than ever before. Customers, including you and I, have higher expectations of those we buy from. We expect people selling to us to:

- Know the main features and benefits of all their products and services

- Explain the main comparisons with competitive products we will have been looking at

- Be informed as to what is happening in the market, current trends and whether what we buy will soon be obsolete

- Give a reasoned, informed response to the concerns we are likely to express as objections

- Have the right brochure, literature or samples readily to hand

- Be truthful about all things, say if they do not know something and offer to find out and get back to us.

Product knowledge health check

To ensure that you in turn offer your customers the same service that you would expect, let us see how you and your company check out:

Product knowledge and market

1. Do you have a comprehensive, up-to-date product knowledge checklist, including Unique Selling Points (USPs)?

2. If so, can you use the checklist to monitor your own product knowledge?

3. Do you have a comprehensive list of all sales brochures and samples?

4. If so, is someone accountable for keeping this updated and circulated?

5. Do you have a list of benefits of each major product feature?

6. Do you have a list of best responses to common objections?

7. Do you know who in the company requires information on competitors, customers or the industry?

8. If so, do you have a system for passing that on?

Suggestions: To help with any of the checklist questions to which you answered 'No' and now want to take remedial action, here are some suggestions which have proved their worth over the years:

1. Product knowledge checklist

Consider brainstorming this with colleagues to come up with a checklist you can tick off or have signed off with your manager when you are fully knowledgeable.

2. Sales brochures and samples checklist

This can be brainstormed, put under suitable headings such as brochures, order forms, samples, stationery etc and circulated to people in the organisation for their input. It can be a useful means of having a spring clean, by getting rid of out-of-date material. Ensure someone is made accountable for keeping the list up-to-date.

This is excellent for new people especially. It greatly reduces the danger of you looking unprofessional by not being able to produce the leaflet the customer wants.

3. Features and benefits

	Feature	Advantage	Benefit
	What it is	What it does	What it does for the customer
Example	24 hours service	Lower inventory need	Less cash tied up in stock

Using the above definitions and examples as a guide, pick some features of your products and develop customer benefits.

4. Answers to objections

1. List the main objections you and colleagues meet

2. Share your responses

3. Seek ideas from product managers or senior people if thought necessary

4. Write down the best responses and keep them on file

5. Share additions and improvements with colleagues.

He who shares, wins!

5. Market information system

Does the following performance standard from the 1999 revised Sales Vocational Qualifications for obtaining and passing on marketing information say it all? Would this be good for your company? If so, why reinvent the wheel?

Element: Contribute to effective sales planning

Performance criteria

You must ensure that:

- Information and feedback about customers and the organisation's products and service is collected and recorded on an ongoing basis.

- Information and feedback provided by customers about products and services is given to appropriate people, to assist effective sales planning.

- Customer information is assessed and ideas for improving sales plans are given to appropriate people.

- Feedback on the organisation's sales plans, sales activities and sales performance is provided to the appropriate people at the correct time.

- Where appropriate, recommendations that contribute to sales forecasting and planning processes are provided to the appropriate people.

- Feedback and recommendations to aid sales planning are supported by clear and valid arguments.

Extracts from the Sales N/SVQ (Revised 1999).

Knowledge requirements

You need to know and understand

Concepts and theories:

- How to gather information about customers and the market.

- The recognised ways of analysing information about customers and the market.

- How to assess the relevance and importance of customers' feedback.

Information:

- Sales planning methods used within the organisation.

- Relevant information about the organisation's customer base.

- Knowledge of relevant products and services.

- Organisational systems for collecting and recording customer and sales performance information.

- Sales plans and activities relevant to own work.

Extract from the Sales N/SVQ (Revised 1999).

The missing link in this market information is an agreed process. Who is involved, when should they be informed and by what methods?

Exercise

If you are not happy with the present system, can you gain agreement on the following matrix? Just tick the appropriate boxes.

Subject	People/Departments interested				
Competitors					
Customers					
Products/ services					
Market conditions					

6. Price lists

It is a good idea to keep a copy of your price list together with your diary, customer records for the day and prospect records for the day to ensure that this information is always handy.

7. Competitor files

You can build up knowledge about competitors by keeping a few pages filed together with your other records. Jot points down as you find them out.

Monitor and manage performance

7

Just as top class sports people continually train and strive to improve, so too do professional sales people.

As you know from Part 1, one of the underlying philosophies of this book is the view that 'whilst the sales manager needs to know how each of his or her sales people are performing, each salesperson should be encouraged and given the tools to manage their own sales by planning, organising and controlling their own sales achievements.'

We now turn this philosophy into practice and show how you can organise your system to:

- Record achievements
- Compare your performance versus company norms
- Monitor your own P.B.s, as athletes say (Personal Bests)
- Provide an objective basis for any performance appraisal discussions
- Self-diagnose areas of your performance in which you would like to improve or seek help.

Methods

The following information usually proves most valuable when monitoring and managing performance:

1. Weekly call summary

2. Quarterly summary

3. Performance overview graphs

4. Prospect overview

1. Weekly call summary

It is a good idea to keep a simple summary of calls and progress made. For most companies, this is done weekly. A minority go for daily (high number of calls) or monthly (low number of calls).

2. Quarterly summary

A quarterly summary will provide you with a longer-term overview of your performance. Using the information recorded on your weekly summaries, you should be able to work out, on an ongoing basis, the key figures and ratios appropriate for your business. Common examples are:

- Average number of calls per week
- Order: call ratio %
- Average order value
- Average prospect calls per week
- Average calls per new account
- New business as a percentage of total business
- Proposals: order conversion ratio
- Average number of product groups per order
- Percentage of overdue accounts
- Average miles per order.

If you are below the company norm on any of these ratios, below are some key diagnostic questions for you to consider. You may be able to think of others.

To answer some of these key questions, you will need to be aware of your company norms and monitor your own performance against them. Company norms may be either:

- The company average
- The expected achievement or performance standard
- The average of the top half of the salesforce
- The minimum acceptable achievement.

Quarterly summary figures and ratios – key questions

1. **Average number of calls per week**
   - Are you making sufficient calls per week?
   - Could you do more calls? Are you concentrating on quantity not quality?
   - Have you got the right balance between quantity and quality?
   - Could you do more calls if you improved your journey planning?

2. **Order: call ratio %**
   - Are you always expected, or do you call without a firm appointment?
   - Are you having difficulty in creating initial rapport and interest?
   - Do you have difficulty in creating a 'buying atmosphere?'
   - Do you have sufficient product knowledge?
   - Do you know enough about the industry?

3. Average order value

- Are you calling on too many small accounts?
- Are you failing to sell across the product range?
- Are you missing opportunities for 'add-on' sales?
- Are you selling or just taking orders?
- Can you overcome common objections?

4. Average prospect calls per week

- Are you making enough prospect calls?
- Does your journey planning enable you to prospect?
- Do you 'get lost' deliberately to find new potential customers?
- Do you know how many prospects you need each month to get sufficient new business?

5. Average calls per new account

- Are you qualifying your prospects, ie establishing some basic interest in your product before you call?
- Do you have clear objectives for each prospect visit?
- Is the main difficulty in:
  - establishing the right person to talk to?
  - getting relevant information?
  - establishing customer needs?
  - understanding the customer's business?
  - getting agreement for a proposal, demonstration or visit?
  - asking for the order?

6. New business as a percentage of total business

- Are you opening mainly small accounts?
- Are you opening sufficient new accounts?

- Are you giving sufficient follow-up service and reassurance to new customers? Are you doing enough prospecting?
- Are you keeping track of which stage each prospect is at?

7. Proposals: order conversion ratio

- Are you following-up your proposals?
- Are your proposals presented professionally?
- Have you matched your product benefits to customers' actual needs?
- Is the problem a lack of selling skills?
- Is the problem a lack of negotiating skills?

8. Average number of product groups per order

- Are you selling across the product range?
- Do you have belief in all your products?
- Do you consciously plan to sell additional products on sufficient calls?
- What advantages do your products have over competitive products used?
- How do some of your colleagues sell more products?

9. Percentage of overdue accounts

- Do you agree that a product is not sold until it is paid for?
- Do you need suggestions on how best to raise the questions of credit?
- Do you discuss the benefits of prompt payment with slow payers?
- Do you develop practical payment methods with your slow paying customers?
- Do you check your new accounts for credit worthiness?

10. Average miles per order

- Do you plan your day's work or offer a blank diary to each customer?

- Do you have an effective journey plan?

- Do you use the petal system described in Chapter 2?

- Do you have clear objectives for each call?

- Do you tend to make too many 'courtesy calls'?

Existing customers: Your quarterly summary may also enable you to monitor the number of active accounts in your area at the beginning and end of each quarter. In view of the profitability of existing customers we discussed in Chapter 4, this is an important area to be constantly aware of.

3. Performance overview graphs

By plotting progress against target on a graph, you will have a quick visual picture of achievement. Use graphs for overall sales and any important market sector or product group that you want to monitor closely. We suggest that you use them for your main targets, that is the ones that give you 80 per cent or more of your volume.

To create a performance overview graph:

- Choose what you will graph and set up the graph axes, eg timescales and percentage sold

- Consider drawing a line or curve from zero to target to show where you should be at each stage of the sales campaign

- Record your actual progress on the graph alongside the target figures.

Tip: graphs are especially useful for those of us who prefer visual rather than written or numerical information.

4. Prospect overview

If you create a prospect overview form as described in Chapter 5, this will enable you to plot the progress of the respective stages of many prospects, at-a-glance.

Personal bests v company norms

Working towards company norms is a useful means of raising your personal competence and performance. But what if you are already on or above the norm? We then suggest that you 'compete against yourself' by aiming to improve your 'personal best' performances on the key ratios shown on your quarterly summary. Move from standard meeter to standard setter!

'Self-managed selling first helps me realise how good I already am, and then lets me enjoy becoming even better!'

Spencer Johnson, M.D., Larry Wilson
THE ONE MINUTE SALES PERSON

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Master your paperwork

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Paper mountain checklist

1. Would you like to improve the way you handle paperwork, be it on a desk or in the car?
2. Do you have some difficulty in finding papers you have filed?
3. Do you ever feel stress and pressure from the amount of your paperwork?

If you have answered 'no' to everything, then skip this chapter.

If you answered 'yes' to any of the questions, tried and tested solutions are now offered. Salespeople especially have found them invaluable in helping them climb the 'paper mountain'.

Consider this true story

Members of a sales team were taking bets about their boss's desk. Some thought it was teak. Some thought it was covered in black rexine. No one could remember having seen it as it was always covered in piles of papers.

Then the sales manager went on a time management course. Moving from sceptic to convert, he soon had the bets settled as he cleared his desk of all its clutter. Since that day, he has become renowned for

his improved ability to action, file and find all the paperwork needed for his job. He is happier too, feeling less stressed and more in control. He has also been promoted!

What brought about this transformation? Three techniques:

1. Organising files into seven sections to handle paperwork faster and more effectively

2. Some simple paper-handling principles

3. A new, easy to set-up and use filing system.

You too can now benefit from all three methods.

one: Organising paperwork

Organise your paperwork into an expanding file with at least seven separate sections. Ideally, this file should be robust enough for use when travelling in the field as well as in the office, and the sections should be able to expand to accommodate bulky items. Filofax produce an excellent paperwork organiser, whilst stationers have similar, though less sturdy versions of 7, 9 or 12 part files.

The seven sections you need are:

1. Mail in – the field version of the in-tray

2. Action now – needing urgent attention

3. Action soon – less urgent items

4. Awaiting reply

5. Read

6. File

7. Mail out – the field version of the out-tray.

Any spare sections can be used for small quantities of stationery such as order forms or price lists.

Based on challenges issued to time management course participants over ten or more years, there is no piece of paper which a salesperson receives which does not go into either one of the above sections or the waste paper basket!

The system also allows you to cut through a large pile of mail in minutes and know what your priorities are.

two: Paper handling techniques

1. Keep a clutter-free desk

93 per cent of British managers have a cluttered desk to varying degrees, according to a 1993 survey by the Industrial Society. This costs office-based people an estimated 37 minutes per day looking for paper they cannot find.

Similarly in sales, we all know the temptation, when working on a difficult task, to be side-tracked into looking at something else – a new product bulletin, the latest sales figures, an expense claim form – anything to stop us having to work on the task in hand. Yet the conscious brain can only work on one thing at a time. So try to remove distractions from your work area.

Is this a distraction?

'Each piece of paper on the desk will distract you up to five times per day.'

CLEAR YOUR DESK

Declan Treacy

2. Ideally, handle each piece of paper only once

If a piece of post can be dealt with immediately, then do so. This saves the endless reshuffling of paper which some people seem to get sucked into. Once a paper is sorted into your seven-part file, it should only need to be handled once thereafter in the vast majority of cases.

> 'I tend to have a rule that anything that comes in during the day goes out in the day. At least I get it off my desk and I take action on it. I think one of the main ways of creating work is to put aside small jobs. I find that if it's something you do right away then bang! that's it. Whereas if you say, 'I'll get around to it one of these days, it's just a minor matter,' you create a whole pile of jobs for yourself.'

Professor George Bain • PRINCIPAL, LONDON BUSINESS SCHOOL

3. Make frequent use of a waste paper basket

85 per cent of what we file is never looked at again! Be ruthless. If in doubt, throw it out!

'My main filing aid is a waste paper basket'

Sir John Harvey-Jones

three: Effective filing

Ask yourself the following questions:

- Do you have some responsibility for keeping some of your own files? (*If your answer is* **'no'**, *then skip this section.*)
- Are you totally happy that you can file and retrieve things quickly and easily? (*If your answer is* **'yes'**, *then skip this section.*)

If you are still reading this, we assume you do some filing but might be interested in ways of doing it better. The following system is again a tried and tested one. It is based on your seven sales key areas (see Chapter 1), and has astonished many who have used it in its simplicity and flexibility.

This example should give you the idea, so that you can set up your own system:

1.0 Company communications

    1.1 Company publications

        1.1.1 Company history

        1.1.2 Annual reports

    1.2 Sales publications

        1.2.1 Sales bulletins

        1.2.2 Quarterly review

1.3 Team communications

    1.3.1   Sales manager

    1.3.2   Sales colleagues

    1.3.3   Sales office

    1.3.4   Other departments

1.4 Policies and procedures

2.0   Customers (A-Z)

3.0   Call planning

3.1 Journey plans

3.2 Weekly call plans

4.0.   Prospects (A-Z)

5.0   Product and market information

5.1 Price lists

    5.1.1   Year round lines

    5.1.2. Seasonal lines

    5.1.3   Promotional lines

5.2 Product information (A - Z)

5.3 Competitor information (A - Z)

5.4 Industry information

    5.4.1   Trade magazines

    5.4.2   Press cuttings (date order)

6.0   Performance planning and control

6.1 Sales targets

6.2 Quarterly summary

7.0   Personal development and training

Personal

Family

Friends

Financial

Hobbies and interests

Holidays

House

Ideas

Write them down as you think of them!

Projects

Any major task in which you are involved, eg special committee, report on competitor, etc.

Contingency plans

Should you need to add a key area for some reason, options available include:

- Combining call planning with customers
- Using the ideas section.

Research recommends that seven, plus or minus two, is the best number of key areas for the brain to comfortably cope with.

A final word on paperwork:

Do it now!

Get more from your meetings

9

Types of meetings

Over the years, many salespeople seem to spend an increasing amount of their time in meetings. For instance, how many of the following types of meetings do you get involved in?

Meetings arranged by you:

- Sales meetings to sell to customers
- Sales meetings to negotiate with customers
- Business review meetings with customers
- Problem-solving meetings with one or more colleagues.

Meetings arranged by others:

- Sales meetings with the rest of the sales team
- Meetings with your manager
- Problem-solving meetings with one or more colleagues
- Other meetings.

To get more from these meetings, the following will prove useful:

- A meetings checklist
- Meeting plans
- A memory aid for each meeting.

Meetings' checklist

For any meeting you organise or attend, assess it against the following guidelines from time to time. This could lead to improving any meeting you run and offers suggestions to improve other meetings you attend:

1. Is the **purpose** of the meeting clear? Why is it being held?
2. Is it held at the right **frequency**?
3. Do the right people **attend**?
4. Does everyone need to be there for **all or just some** of the meeting?
5. Could the **numbers** attending be reduced?
6. Is an **agenda** always prepared?
7. Is the agenda circulated **in advance**?
8. Are **time guides** given for each session?
9. Is the expected **duration** of the meeting always given?
10. Does the meeting always **start on time**?
11. Does the meeting always **finish** on time?
12. Are people who are expected to introduce a session always **pre-warned**?
13. Could some **reports** and information be circulated for reading before the meeting?
14. Do you yourself always **prepare questions or ideas** to bring to meetings?
15. Do you always bring the **relevant papers** to all meetings?
16. Are the **venues** always the most convenient possible?
17. Are **interruptions** prevented?
18. Are the **seating** arrangements always suitable?

19. Are **visual aids**, eg flip chart, projector, pens etc always suitable, provided and checked beforehand?

20. Are regular **stretch breaks** arranged, eg five minutes every hour to improve concentration and meeting productivity?

21. Do you personally always get to meetings **on time**?

22. Do you **present** your ideas well?

23. Do you **listen actively** to others?

24. Do you **show interest** in what others are saying?

25. Are you **flexible and open** to new ideas?

26. Are you a **builder of ideas** or a blocker?

27. Do you help meetings by **seeking clarification and summarising** discussions?

28. Do you argue your case inside the meeting but are **loyal** to the company in front of customers?

29. When chairing a meeting do you create a **constructive climate**?

30. Do you show **courtesy and respect** to all participants?

31. Do you ensure there is only **one conversation** at a time?

32. Do you try to keep people **on the subject**?

33. Do you **keep things moving** without rushing?

34. Do you produce simple **action points** of what is to be done by whom by when, after your meetings?

35. Do you **circulate these** within two days of your meetings?

36. Do you ensure that you **action** your action points?

Meeting plans

Have you ever thought of something you want to raise at a meeting and then either forgot it or could not find where you had written it down? If so, you will find it very helpful to create and file a meeting plan in advance of each meeting. These should have room to record such things as:

- Meeting date, start and finish time
- Venue and telephone number
- Main objectives of the meeting
- Agenda – helping you to jot down things you want to raise as you think of them prior to the meeting
- Preparation required, eg reports, visual aids, samples, print-outs etc.
- Decisions taken (action points) – who by and by when
- Room for other notes, costs and date of next meeting.

For normal sales call 'meetings' with customers, remember the following points to plan, as discussed in Chapter 4 on developing existing customers:

D evelopment objectives

I nformation objectives

S ales objectives and

C heck that you have got all you need for the call.

Meeting memory aid

Sometimes, you may have to attend a meeting at short notice. You may therefore not have had time to prepare adequately. So, often in some companies, these short-notice meetings are poorly run and are not very productive. It need not be so!

If there is no format for such meetings, we recommend that you work to the following checklist:

P urpose – Why are we holding this meeting? What do we hope to achieve?

A genda – What points do we need to cover?

T imes – How long do we need? What time constraints do we have to start and finish?

S ummarise – Check agreements to ensure common understanding.

A ction points – Bullet points of who will do what by when.

T ell others – Who is involved? Who will be affected? Who needs to know?

Summary

Finally, remember that sales meetings are like a sale. They should seek to:

- Get the **attention** of all present
- Create **interest** through involvement
- Build up a **desire** to resolve the issues
- Obtain **action** and commitment from participants.

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Manage your own development

10

The setting

The annual conference of a large UK sales force.

The scene

The hotel bar about 1 a.m. A confident-looking member of the sales force, clutching a large gin and tonic, sidles up to the well respected company chairman.

Salesperson: 'I'd just like you to know that I am very ambitious.'

Chairman: 'Glad to hear it.'

Salesperson: 'In fact I'm so ambitious, that one day I'll want your job.'

Chairman: 'Good. And what have you done about it?'

Salesperson: 'Sorry?'

Chairman: 'Well, what have you read recently on sales or sales management or business in general? What tapes have you listened to, what projects have you got involved in that will help you achieve your ambition?'

Salesperson: 'Ah! I see. Well, I've just been on a training course and I've had my appraisal.'

Chairman: 'Yes, well that is what the company and your manager have done for you. But what have you done for yourself?'

If you were that salesperson, how would you respond? Do you accept that the responsibility for your development is a shared one?
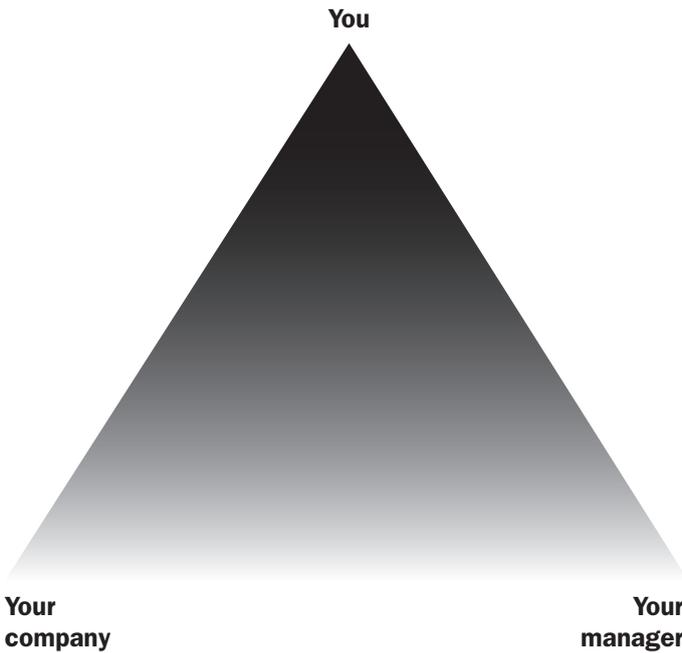
Figure 4: Sharing the responsibility

Just try this development checklist – decide whether you agree or disagree with the following statements:

1. **Your company's responsibility** for your development is to provide training plans and resources to help you understand and contribute towards company business objectives.

2. **Your manager's responsibility** for your development is to give on-job training, guidance and opportunities to help you develop and contribute towards the sales team's business objectives.

3. **Your responsibility** for your development is:

    •   To take ownership of your personal career plans

    •   To self-manage your sales territory, as 'territory managing director'

    •   To identify and agree your areas of strength and development needs

    •   To develop plans for your own self-development.

If you agree with most of these items, the next question is how do you go about it?

The 4P proactive plan

You can develop yourself very effectively if you follow the 4 Ps, which stand for:

•   **Picture** what you want to be or to do or to achieve

•   **Prioritise** your development needs in order to get there

•   **Plan** how you will meet these needs

•   **Progress** by carrying out your plan and reviewing the improvements.

1. Picture

The more clearly you know what you want to achieve, the more likely you are to achieve it. So look at the big picture of your life. What goals do you want to set yourself? What balance do you want? Here are seven headings to start you thinking:
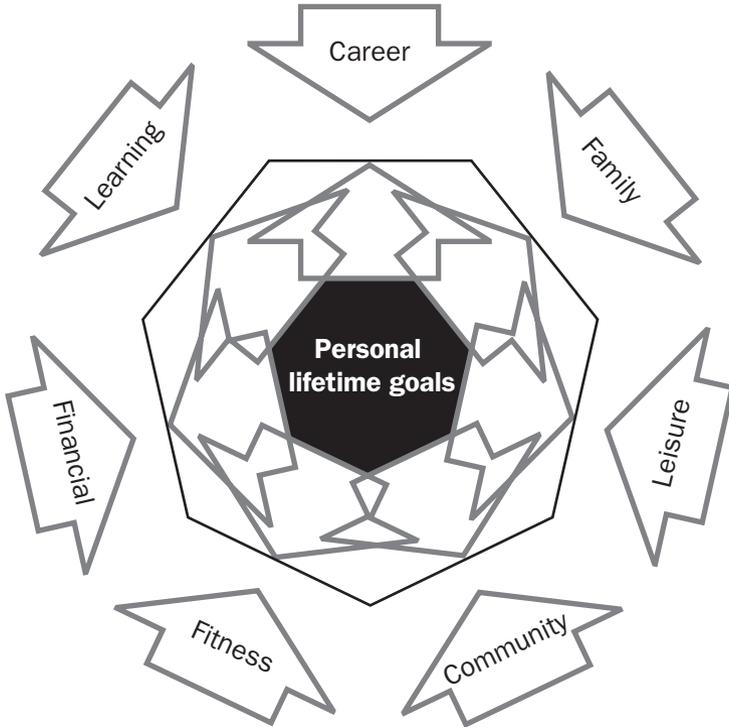
Figure 5: Your personal lifetime goals

Now list your life goal objectives.

2. Prioritise

Focusing now on your career development goals, the next step is to identify and prioritise the aspects of selling you need to work on most.

To do this, you need to judge yourself against something that is comprehensive, relevant to your job and measurable:

- Compile as comprehensive a list as possible of all the qualities and competencies currently needed in your job. Try to include every task involved in each aspect of your work. Against each item, rate yourself on a simple scale (eg 0 = No competence or experience, 1 = Some competence, 2 = Fully competent)

- Look down the list and pick out the top three or so aspects you want to work on and put these in priority order.

3. Plan

Identifying your priority development needs but doing nothing about it is like making a 'wish list'! You need to plan to get results.

So, having prioritised your needs, write down what actions you plan to take and by when. To help you do this, here is a list of some development activities for you to consider, over and above the normal ones of doing the job, having field accompaniment, internal courses, meetings and appraisals. You may be able to identify other activities you could undertake:

- Accompanying your manager or director on a major customer negotiation

- Arranging a client factory or head office visit

- Chairing all or part of a meeting

- Deputising for your manager when he or she is on holiday

- Listening to sales or management tapes in the car

- Becoming a member of an action group set up to solve a company problem
- Using outside hobbies and interests to develop organisational and people skills
- Producing a list of best answers to common objections for use by colleagues and new recruits
- Public speaking at sales, customer or outside meetings
- Reading books on selling, negotiating, major account management, sales management, autobiographies of business leaders, general management, trade magazines
- Visits to other company departments
- Writing a report on a competitor, or a new product opportunity.

4. Progress

Questions:

- How do you prevent your personal development plan from slipping quietly into oblivion?
- How do you make sure that you are regularly reminded about your good intentions?

Answers:

- By setting review dates for yourself, eg quarterly
- By writing the review dates on the appropriate monthly overview to keep it 'in sight and in mind' (see chapter two).

Progress:

You may also like to consider obtaining a nationally recognised qualification in sales. These now range from various sales NVQs, to certificates and diplomas in sales, sales management and key account management. Let us tell you more…

Once you are fully competent in your chosen improvement areas, look back over the list of required competencies and qualities you made and set yourself new priorities with a new action plan. This structured approach to developing your sales knowledge and skills is surely better than relying on chance or on other people.

Sales National Vocational Qualifications
Sales Scottish Vocational Qualifications (N/SVQ)

'Their defining feature is that they are, to use the current jargon, competence-based rather than knowledge-based. In plain English, that means that instead of testing what you know, NVQs measure what you do.'

Malcolm Brown • MARKETING BUSINESS, NOVEMBER 1993

Sales N/SVQs are:

- Meant to prove that you can do the job, not just talk about it
- Based on national standards developed by sales executives from a wide range of industries
- Approved within a framework of government-supported National Training Organisations
- More understandable and user-friendly, following revisions and a 1999 re-launch

- Broken down into units that can be followed one at a time or in any combination, until you have all the necessary units to make up the qualification.

Units of competence are broken down into specific chunks called **Elements**. Each unit has a general description or **Unit Descriptor**. Each element has **Performance Criteria** that need to be met and **Knowledge Requirements** – what candidates will need to know and understand.

As stated previously (page 25), to achieve a Sales N/SVQ Level 3, a candidate must complete all seven mandatory units plus three optional units, making a total of ten units. One of the mandatory units is entitled 'Generate and follow up sales leads.'

Moving to page 52, you can now see the Unit Descriptor for that unit and a listing of the three elements which make up the unit. The third element was about up-selling and cross-selling. The performance criteria and knowledge requirements are shown here:

Unit: Generate and follow up sales leads

Element 3: Recognise and exploit opportunities for up-selling and cross-selling

Performance Criteria – You must ensure that:

- Information provided by customers about their buying needs and interests is assessed for the potential for up-selling and cross-selling

- Customers are questioned about their need for, or interest in, other products and services

- Customers are provided with relevant information about other products and services which may interest them

- Relevant colleagues are informed about further sales opportunities which can be pursued with the customer

- The salesperson remains sensitive to the needs of the customer when pursuing opportunities for up-selling and cross-selling

- Information about the customers' buying needs and interests is recorded in order for future opportunities for up-selling or cross-selling.

Knowledge requirements – you need to know and understand

Concepts and theories:

- The questioning and listening techniques which are employed in the sales context.

- How to effectively present a sales case to customers.

- The purpose and method of maintaining accurate records of contact with customers.

- The difference between additional sales, cross-selling and up-selling.

- How to identify and exploit opportunities for up-selling and cross-selling.

> **Information:**
> - The features and benefits of the range of products and services that are being promoted.
>
> - The colleagues to whom information about potential further selling opportunities and unfruitful leads should be supplied.
>
> - The terms at which the range of products and services can be supplied.

Sales NVQs were first launched in 1993 and Key Account Management was added in 1997. Following a complete revision in 1999, the Sales Standards and Awards now are:

Telesales	Level 2
Sales	Level 2
Telesales	Level 3
Sales	Level 3
Sales Management	Level 4
Key Account Management	Level 4

In all these N/SVQs, you can:

- Train and qualify at a pace that suits you and your company.
- Get recognition for abilities you have already without the need for further training - so long as you can prove that you can do the job.
- Gain a nationally recognised qualification.
- Improve your knowledge about all aspects of your job.

Assessment is:

- Done on the job by specially trained assessors
- Able to be done by managers within your own company when they are trained to do so.

Full details of the Sales NVQ can be obtained from City & Guilds, one of the five awarding bodies:

City & Guilds
1 Giltspur Street
London EC1A 9DD
Telephone: 0207 294 2800
Fax: 0207 294 2400
E-mail: enquiry@city-and-guilds.co.uk

Sales Certificates and Diplomas

Details are also available from The Chartered Institute of Marketing for alternatives to the N/SVQ competency-based qualifications. These are:

- Certificate in Professional Sales
- Advanced Certificate in Professional Sales Management
- Advanced Certificate in Key Account Management
- Diploma in Professional Sales Management

'*As a leading global organisation we need a world class salesforce. The Sales Diploma will ensure that there is a benchmark to aspire to.*'

Alan Coulter • DIRECTOR OF CLIENT MANAGEMENT, ICL

Institute of Professional Sales (IPS)

A sister organisation of the Chartered Institute of Marketing, the IPS was formed in 1997. It brings a welcome recognition of the importance of professional sales skills, in the increasingly competitive markets facing virtually all organisations.

'*If the key purpose of business is to gain, develop and keep customers, then those involved in this process must be professionally competent. Formal recognition of such competency together with the ability to develop further and attain meaningful qualifications, is one of the many reasons we are keen to promote IPS membership to our sales people.*'

Ken Robertson • PARCELFORCE

Membership of the IPS offers a clear training path from basic to advanced sales and sales management techniques, progressive qualifications and many other benefits. Full details of these, can be obtained from:

The Institute of Professional Sales
Moor Hall
Maidenhead
Berkshire SL6 9QH
Tel: 01628 427370
Fax: 01628 427369
e-mail: johnmayfield@iops.co.uk

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part
three
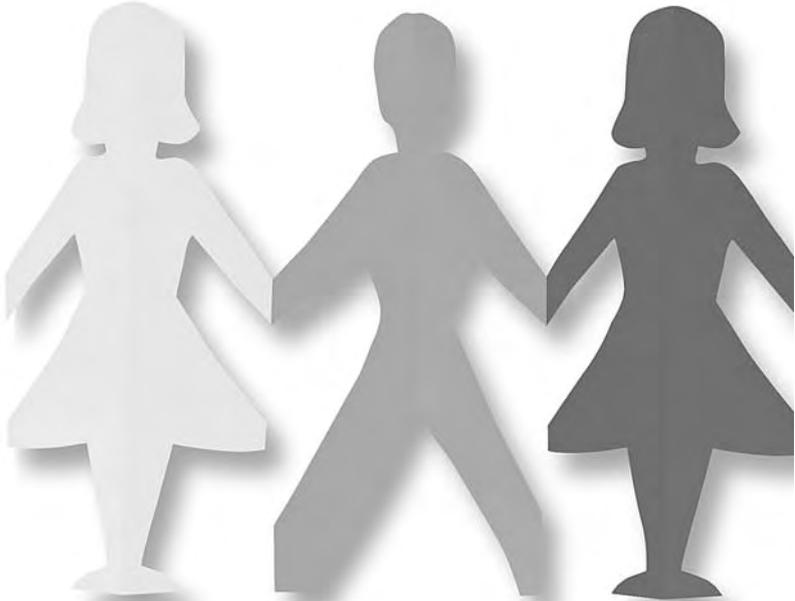
system

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Part three
System

Introduction

Part three describes a comprehensive *Filofax*-style paper-based system, covering all the needs of a sales team to help them plan and monitor their sales activities. It can be used in a variety of ways such as:

- An 'off the shelf' system for any size of organisation with no, or minimal sales management system in place
- A template to highlight what might be needed, for an organisation to compare and improve its existing system, be this paper-based, computer-based, or
- A combination of the two.

During the nineties, the trend has been towards this combination of the two. Computer-based sales management systems can be excellent in for instance, keeping comprehensive customer records, which are available throughout the organisation and in transferring sales information from one file to another, quickly and accurately.

However, paper still has its place in the twenty first century. For many people, *Filofax*-style organisers are still quickest for recording such things as customer queries, appointments and telephone messages. Major software houses are frequent buyers of organisers!

The illustrations in this section are of pre-printed stationery produced by *Filofax*, but any of these forms could easily be produced in the office. For those who prefer pre-printed stationery, contact information for *Filofax* is given at the end of this book.

The range of computer-based sales systems is vast. It ranges from the general all-purpose types to the industry-specific. Deciding first

what features you want from a paper-based system will help you to specify your needs from a computer-based system.

System layout summary

For a fully paper-based system, we suggest that you organise a binder containing the following documentation to carry with you, so that your plans, objectives and key areas are always 'in sight and in mind'. Ideally, this should be organised into the following sections, based on the sales key areas discussed in Chapter 1:

Overviews and plans:

- Year overview
- Journey planner
- Day planners – suggest one month, maximum two months
- Monthly overviews – suggest minimum of six at all times
- Key area objective plans
- Sales key area index

Key area 1: Communications
- Note paper

Key area 2: Customers
- Call frequency/product code index
- Customer record cards – for today's calls only
- Call frequency overviews
- Key account planners

Key area 3: Call planning
- Weekly call planners
- Pre-call planner

Key area 4: Prospects
- Prospect criteria/prospecting code index
- Prospect overview
- Call frequency/product code index
- Prospect records

Key area 5: Product and market information
- Product benefits planner
- Lined notes

Key area 6: Performance control
- Weekly call summary
- Quarterly summary
- Sales graphs
- Expenses envelope

Key area 7: Personal development
- Personal development form

Personal, home and social

Ideas
- Note paper

Contacts A-Z
- Address/Telephone

Meetings
- Meeting plans

Data

- Data such as UK map and travel information

Business cards

- Keep a supply in perhaps a clear PVC pocket in your binder to keep them clean and flat

There are three other items that you may choose to keep in the office or carry with you when required:

Customer record files

- Call frequency/product code index
- Customer records

Seven part paperwork file

This sales management book

Let us look at the suggested contents of your binder or personal organiser in more detail…

Year overview

As a 'portable wall planner', to give an overview of the year and to help outline planning, use a year overview for activities taking a full day or more, eg holidays, meetings, conferences, courses, sales campaigns, exhibitions, trade fairs, colleagues' holidays.

Exercise:

- Block in any such full days you know about from your current diary
- Consider including any deadlines for major target or objective achievements.

1999 Overview

	January	February	March	April	May	June
			1		1 Park Hockey(LTD)	
		1	2		2	1
		2	3		3	2
		3	4	1	4	3
	1	4	5	2	5	4
	2 Park Hockey(LTD)	5	6	3	6	5
	3 Park Hockey(Sevas)	6	7	4	7	6
	4	7	8 NEC	5	8	7
	5 NAT. CONF.	8	9 • •	6	9 M's B'day	8
	6 • •	9	10 • •	7 SALES MTG.	10	9
	7 • •	10 • •	11	8	11	10
	8	11	12	9	12	11
	9	12	13	10	13	12
	10	13	14	11	14	13
	11	14 Low Theatre	15	12	15	14
	12	15	16	13	16	15
	13	16	17 Th Parkes Dev(N 39)	14 Good Friday(LTD)	17	16
	14	17	18	15	18	17
	15	18	19	16	19 SALES MTG.	18
	16	19	20	17 Park M Rom	20	19
	17 H.Q. TURNERS	20	21	18 HOLIDAY	21	20
	18	21	22	19 • •	22	21
	19	22	23	20 • •	23	22
	20	23	24 HOLIDAY	21 • •	24	23
	21	24 SALES MTG.	25	22	25	24
	22	25	26	23	26	25
	23	26	27 HOLIDAY	24	27	26
	24	27	28	25	28	27
	25 SALES TRG.	28	29	26	29 Park Hockey(LTD)	28
	26 • •		30	27	30	29
	27 • •		31	28 D-M. DAY	31	30 SALES MTG.
	28			29		
	29			30		
	30					
	31					

1999 Overview

	July	August	September	October	November	December
		1			1	
	1	2			2	1 SALES MTG.
	2	3	1	1	3	2
	3	4 ½ DAY MTG.	2	2	4	3
	4	5	3	3	5	4
	5	6	4	4	6	5
	6	7 Park Hockey(Sevas)	5	5	7	6
	7	8	6	6	8 WEMBLEY	7
	8	9	7	7	9 • •	8 XMAS PARTY
	9	10	8	8	10 • •	9
	10	11	9 SALES MTG.	9	11	10
	11	12	10	10	12	11
	12 Park Hockey(N 30)	13	11	11	13	12
	13	14	12	12	14	13
	14	15	13	13	15 PRODUCT MTG.	14
	15	16	14	14	16	15
	16	17	15	15	17	16
	17 HOLIDAY	18	16	16	18	17
	18 • •	19	17	17	19	18
	19 • •	20	18	18	20	19
	20 • •	21	19	19	21	20
	21 • •	22	20	20 SALES MTG.	22	21
	22 • •	23	21	21	23	22 HOLIDAY
	23 • •	24	22	22	24	23
	24 • •	25	23	23	25	24
	25 • •	26	24	24	26	25 Christmas Day(LTD)
	26 • •	27	25	25	27	26 Boxing Day(LTD)
	27 • •	28 Park Hockey(Sevas)	26	26	28 ANNIV	27 HOLIDAY
	28	29	27	27	29	28
	29	30	28	28	30	29
	30	31	29	29		30
	31		30	30		31
				31		

Journey plan (see Chapter 2)

Create a journey plan to show where you plan to be on which days for your regular calls and to help reduce the miles per call travelled. Other calls, prospects, queries and smaller accounts can be fitted in around these main calls.

Journey Planner

* Record Area/Town in Top Section Of Each Box

	Week 1	Week 2	Week 3	Week 4
M O N D A Y	✳ COVENTRY Ⓐ INGHAM AND PARTNERS CARTHELLS MITCHELL ASSOCIATES	AYLES/H.WYCOMBE Ⓒ BUCKS C.C. JOHN LEWIS - H.W " " -M.K	SLOUGH Ⓒ D.ESIGN PARTNERSHIP H. HILL DESIGN	COTSWOLDS Ⓓ HARMAN + SON COUNTY BUILDERS
T U E S D A Y	✳ M.KEYNES Ⓐ JOHN LEWIS FINE PLANS M.K. HOSPITAL	OXFORD Ⓒ J. RADCLIFFE HOSP. ROLER GP. RE-	SWINDON Ⓓ ACE HOTELS HOYLAND - KELLY	RUGBY INGHAM AND PARTNERS MITCHELL ASSOC. ROBINSON INTERIORS
W E D N E S D A Y	✳ READING Ⓒ JOHN LEWIS SCOBLE DESIGNS J+K SERVICES			WYCOMBE Ⓒ - M.K H-W
T H U R S D A Y	✳ CHELTENH A.J.L ARCHIT C+G			
F R I D A Y	✳ STRATFORD/WARWICK Ⓐ SHIRE HALL BLANFORDS FOSTER + TURNER	WATFORD Ⓑ PROSSER ENGINEERING J. LEWIS - M.K	OXFORD J. RADCLIFFE HOSP. ROVER GROUP RE- DESIGN	CHELTENHAM Ⓓ C+G HEWITSON DESIGN

Keyline
M9001

Monthly overview (*see Chapters 2 and 3*)

Use monthly overviews for:

- Booking appointments
- An instant overview each month of how many appointments you have and when you have room for more.

Exercise:

- From your journey planner, write which towns/areas you plan to be in each day (see left hand column, opposite)
- Transfer current appointments to this month's overview
- Transfer other appointments to the appropriate month overview
- Always carry at least six monthly overviews to enable you to forward plan appointments.

Notes:

- On the reverse side of these *Filofax* pre-printed dated pages is space to record the month's sales targets and any other key objectives.
- Check key area objectives for any targets, deadlines or actions needed this month and record on the overview.
- As the month progresses, file individual day planners under the monthly overview, thus keeping all targets and objectives constantly 'in sight and in mind.'

Month Overview
November 1999

12 Remembrance Sunday 30 St. Andrew's Day

Wk No / Date	8 0830	9 0930	10 1030	11 1130	12 1230	1 1330	2 1430	3 1530	4 1630	5 1730	6 1830
44 1 Wed	COV./RUGBY	INGHAM + PARTNERS 9.15 FINE PLANS	10.30 M+M	MITCHELL + ASSOC. 11.30 JOHN L.	C.C. ASSOC. JACKESONS 12.15	1.30 IN-HOUSE	2.15 CARTMELS	M.K. HOSPITAL 3.00	DESIGN FELLOWSHIP	FRINTON FROLICS	
2 Thur	H. KEYNES	9.15 FINE PLANS		11.00 JOHN L.			(GRAHAM) (HENLEY) 2.30 ASSOC.		IN-COLOUR		
3 Fri	READING	SCOBLES	10.30 JOHN L.								
4 Sat											
5 Sun											
45 6 Mon	CHELTENHAM		A.T.L. ARCHITECTS			C+G (LUNCH)			PRESENTATION		
7 Tues	STRAT./WARWICK	BLANFORDS			12.30 ROBINSONS				4.30 SIMPSON (GRAHAM)		
8 Wed	RYLESS/HAWK	JOHN L. M.K.	10.45 ROVER	BUCKS C.C.	12.30 POWELL ASSOC. LOIS DESIGN		2.30 SAYLE HALL	BLINDS-4-U	JPB 4.15 BUILDING SEC.		
9 Thur	OXFORD	RE-DESIGN	10.00 GRANT INTER.				2.30 JOHN L. M.K.				
10 Fri	STROUD/CIREN						2.30 ROSCLIFFE 2.15 KENT SMITH + MATT	3.30 ALL WAYS			
11 Sat											
12 Sun											
46 13 Mon	COV./LEAM	INGHAM + PARTNERS 9.30 PROSSER ENGINEERING	10.30 FORSYTH + CO.	MITCHELL + ASSOC.			2.30 INDUSTRIAL DESIGN		4.15 4.30 JOHN L. M.K.		
14 Tues	WATFORD		10.30 UNIVERSAL DESIGN								
15 Wed	SLOUGH										
16 Thur	SWINDON			BLACK + JOHNSON							
17 Fri	BROMSGROVE			ROBINSON INTERIORS			ACE HOTELS				
18 Sat											
19 Sun											
47 20 Mon	BICESTER/BKGE		COUNTY BUILDERS	SALES MEETING							
21 Tues	OXFORD										
22 Wed	COTSWOLDS										
23 Thur	RUGBY					H. HILL RETAIL - NEW SHOP OPENING					
24 Fri	RYLESS/HAWK										
25 Sat											
26 Sun											
48 27 Mon	READING	A.K. PARTNER									
28 Tues	CHELTENHAM										
29 Wed	COVENTRY										
30 Thur	SLOUGH/MAID	WILKINSONS									

Notes

		Holidays	No. Days	From	To
		AMB	4	26	29

OCTOBER
M T W T F S S
1 2 3
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31

DECEMBER
M T W T F S S
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31

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Day planners (see Chapters 2 and 3)

Use individual sheets to plan each day. Use these for:

- Listing today's appointments
- Prioritising jobs to be done
- Seeing where these jobs can be fitted around your fixed appointments.

Prioritise using the simple or advanced method. Planning the night before will help you off to a good start. We suggest you only carry one month's day planners with you, and a maximum of two month's.

Note paper

Keeping messages in one place reduces stress and increases efficiency. We suggest that you keep a supply of note paper in the Communications, Key Area 1, section of your organiser. Use it:

- to jot down telephone and other messages to or from people
- to note down customer queries or action needed.

Check these notes for action needed when making each daily plan.

7 Tuesday
November 1999

Schedule

8 0830

9 0930 — 9.15 FINE PLANS

10 1030 — JOHN LEWIS

11 1130

12 1230 — 12.15 C.R. ASSOC.

1 1330 — IN-HOUSE

2 1430

3 1530 — M.K. HOSPITAL

4 1630

5 1730 — FRINTON FABRICS

6 1830

Notes

- Buckingham design for their sales?

- Take new pricing proposal

Evening Plan

- Prospect
- Brochure
- Stockist potential?

Expenses

NOVEMBER
M T W T F S S
1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30

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Customer records (see Chapter 4)

Customer records are vital for effective management of your sales area. Use them to:

- Record customer details, trading history and potential
- Record helpful comments from each call and ideas for next call objectives
- Analyse business achievement against targets over quarters or years
- Set sales targets for at least your top volume customers
- Track product buying history and increase cross-selling of products
- Note competitive information.

To start using this system immediately, create a record for each customer you are calling on tomorrow or next week. Aim to have a customer record for all your customers within an agreed timescale.

By always referring to your customer records before each call, you will be able to pick up where you left off on the last visit and project a consistently professional image.

File your customer records separately from the binder that you carry with you on sales calls. Each day, transfer only the records that you need for the day's calls to your main binder.

Customer Record Card

Call Date	Comments On This Call/Notes For next Call. Performance v Objectives	Next Call Objectives
2/3	Glidex rep left. Having problems with them. Likes our new design. Only room for 75%. Going for weekend in Brighton late March (W. Arrive).	Go for more display space less / Glidex. Sell our consultancy service.

Customer Record Card

1 Company **FRINTON FABRICS**
Address **UNIT 7 OAK TREE WALK**
SECKLOW GATE WEST
CENTRAL MILTON KEYNES
Post Code **MK9 3BC** Account No. **64109R**

Call Frequency M

Telephone (0908) **362333**
Facsimile (0908) **392727**
Annual Turnover (GROUP) **£8M**
Number of Employees **12 (110 TOTAL)**

Type of Business/Account Category

Parent Company Information

Contacts' Name	Mr/Ms/Mrs +initials	Title/Position	Ext. No.	Best Time /Best Day (if any)
JOAN GOODWRIGHT	Mrs	BRANCH MGR.	–	NOT 12-2
HELEN JONES		DEP. MGR.		

Product Information - See Product Code Index

Product/Service group	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
2 Products Bought ✓	✓		✓	✓	✓	✓	✓	✓								
3 Bought from Us ✓	✓			✓	✓	✓										
Last Year from Us ✓	✓			✓	✓											
Previous Year from Us ✓	✓			✓	✓											

Other Products/Competitor Information

Glidex main stockist. Sells them on price, us on quality. Only was one design consultancy + installation service - uses Glidex.

Business Analysis:(Years Or Quarters)						
4 Period	**1996**	**1997**	**1998**	**1999**		
5 Target	(opened)	19,056	17,000	19,015		
Amount	7,021	17,024	18,109			

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Weekly call plan (*see Chapter 3*)

Many sales people, as well as their managers, find it very helpful in planning and focusing their efforts to prepare an outline plan of the following week's calls. A copy can be sent to your sales manager.

Weekly Call Planner

Week Commencing __1/3/9x__

From: __DAVID SCOTT__

To: __A·H·B__

Time/Customer/Town/Main Objective (s)

MONDAY

9·00	INGHAM + PARTNERS - Coventry - Service call
10·30	M+M - Coventry - New designs
11·30	MITCHELL + ASSOC. - Coventry - Discuss Harris Quote
2·15	CARTMELLS - Rugby - Sell new designs / sort query
4·00	GRAND DESIGN - Rugby - Prospect A/C

○

TUESDAY

9·15	FINE PLANS - N. Pagnell - Update on current tenders
11·00	JOHN LEWIS - Milton Keynes - Service call
12·15	C.R. ASSOC. - Show new designs, credit problem?
1·30	IN HOUSE - M.K - Get specified for hotel project
3·00	M.K. HOSPITAL - Presentation on company
5·00	FRINTON FABRICS - New designs

○ ○

WEDNESDAY

9·00	SCOBLES DESIGN - Reading - Service call
10·30	JOHN LEWIS - Reading - New samples
12·00	JACKSONS - Check stock / New designs
2·30	GRAHAMS - Henley - New designs
4·00	IN-COLOUR - Harlow - Sell consultancy service

THURSDAY

10·00	ATL ARCHITECTS - Cheltenham - Discuss costings
1·00	C+G - going for lunch / Branch refurbishment
3·00	BLINDS - 4 - V - Cheltenham - new designs
4·30	BROWN + SIMPSON - Stroud

○

FRIDAY

9·00	BLANFORDS - Stratford - Discuss seconds
11·00	FOSTER + TURNER - Warwick - Closing down.
12·30	ROBINSONS - Kenilworth - New designs
2·30	SHIRE HALL - Warwick - Presentation on company / Identify scope of county needs.

○ ○

NOTES

Jarvis and Bailey cancelled Thur. a.m. appointment - will prospect in Cheltenham area.
* Will try and arrange follow-up from you

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Call frequency/product code index *(see Chapters 2 and 4)*

You should include an index to your company call frequency guide-lines and product group definitions for use on customer records and prospect records.

Exercise:

- Agree call frequency guidelines
- Agree product code definitions
- Write these onto the call frequency/product code index cards.

Beware of monitoring too much – try not to use too many product group categories on the records!

Product Code Index

A	CURTAIN TRACKS — DOMESTIC
B	CURTAIN TRACKS — COMMERCIAL
C	MOTORISED TRACKS
D	BLINDS
E	FABRIC SUPPLY
F	CURTAIN MAKING
G	ACCESSORIES
H	DESIGN CONSULTANCY

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Call Frequency Index

Example of
Call Frequency Codes and Criteria:

Code	Frequency	Criteria e.g Targetted or Potential Annual Business
W	Weekly Calls	
F	Fortnightly Calls	20,000 units
M	Monthly Calls	10 – 20,000 units
S	Six Weekly Calls	5 – 10,000 units
E	Eight Weekly Calls	3 – 5,000 units
Q	Quarterly Calls	1 – 3,000 units
		Less than 1,000 units

Call frequency overview *(see Chapter 2)*

To give an instant visual picture of over 30 accounts and who is due for a call:

- List your customers in a suitable order, eg from a computer printout, in account number order, alphabetically or geographically

- Put as little detail as you need to identify each one

- Use a simple coding system, eg/ = Call, X = Call and order

- Record the call frequency code from the call frequency index card

- As you complete each call, put the appropriate code next to the appropriate customer.

Very soon you will build up a visual picture of your calling pattern on all your customers. Check this overview each week as you complete your weekly call plans. Use each overview for a twelve-month period.

Call Frequency Overview

C F = Call Frequency

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	C F	Account Number/Town Company Name
/	X	/							/	X	/	M	BUCKS C.C.-AYLESBURY
X	X								X	X	X	M	H. HILL RETAIL - AYLESBURY
									/			M	POWELL ASSOC.- AYLESBURY
	X								/		/	E	S.MANDEVILLE HOSP.-AYLESBURY
/									X			S	HENDERSONS-BLETCHLEY
X										/		E	THE WILSON PARTNERSHIP - BUCKINGHAM
X		/								/	/	M	D'ACCORD DECOR - HIGH WYCOMBE
X	X								X	X	X	F	JOHN LEWIS - HIGH WYCOMBE
/										/		S	NOBLE AND NOBLE - HIGH WYCOMBE
/								X				S	WILKINSONS - HIGH WYCOMBE
X	/	X							X	/	X	M	M.C.G. ASSOCIATES L.BUZZARD
		/							X			M	C.R. ASSOCIATES MILTON KEYNES
/	X									/	X	M	FINE PLANS - NEWPORT PAGNELL
	X	X							X	X	X	M	FRINTON FABRICS - MILTON KEYNES
/	X	/							X	/	/	M	IN-HOUSE - MILTON KEYNES
X	X	X							X	X	X	F	JOHN LEWIS - MILTON KEYNES
X	/								/	/	/	M	MILTON KEYNES HOSPITAL - MILTON KEYNES

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Key account plans (see Chapter 4)

To record development objectives, strategies and action plans for your major customers, create a key account plan using the following checklist. Create one of these for at least your top ten accounts.

Key account plans should record the following information:

- Do you need people at different levels to maximise sales, eg your MD/their MD, your technical people/their technical people etc?

- What is your pattern of trade, profits and margins? If you do not know, should you find out?

- What are your current terms, call frequencies, number of deliveries, payment/credit record, business development methods, technical support etc?

- Can you think of ways of improving the service or making it more cost-effective?

- Long-term, what are your aims with this account? What slice of the business do you want?

- Could you handle all of it? To achieve your longer-term goals, what do you plan to do this year? (**Objectives**)

- How will you go about this? (**Strategies**)

- What target dates will you set?

- When will you review progress and who with?

- Actual versus planned figures and a review of progress.

'Whether you believe you can or you believe you can't — you're right!'

Henry Ford

Key Account Planner

Period	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Total
Target	50,000	60,000	70,000	70,000	250,000
Actual	52,000				
% Achieved	104%				

7 Progress Review 1

New shop successfully installed – we are prime
supplier. promising figures.
Head office visit set for 17 June ....
hospitality tent for ....
still ....

Date 28/4

Key Account Planner

Customer **HEATHER HILL DESIGN**   Location **AMERSHAM (H.O.)**

1

Our People Involved	Position	Their People Involved	Position
R.J. HARRIS	M.D.	H. HILL	M.D.
A.H. BELL	SALES MGR.	LANCE PRICE	OPERATIONS DIR.
P. WHITE	DESIGN CONSULTANT	S. WILLIAMS	DESIGN DIR.
D. SCOTT	SALES EXEC.	M. FINLAY	OPERATIONS MGR.

2

Trading History	This Year To Date	Last Year Total	Previous Years' Business	
Business With Us	£52k	£126k	£73k	£29k
Gross Margin		16.2%		
Gross Profit		£20.4k		

3 Current Terms/Service Arrangements

15% discount and fortnightly call to all retail
branches. We give technical help on industrial
and commercial window fittings when asked.

4 Long Term Aim With This Account

To become preferred supplier for all retail shops
To   "   "   "   "   all industrial
contracts.

5   6

This Year's Objectives - What We Will Do	Strategies - How We Will Do It	Target Dates	Actual
Be main supplier in New Aylesbury shop.	Maintain excellent service Additional 25% retro v target DS - Train all store staff As above	APRIL 94 DEC 94	
Be nominated supplier in at least 50% of new contracts this year	P. White / S. Williams Site visits M.D. H.O. visit D.S - Co-ordinate	AS needed from MAR JUL/AUG ONGOING	

Date agreed **27/1/99**   Review Date 1 **30/4**   Review Date 3 **31/10**
Review Date 2 **31/7**   Review Date 4 **JAN 00**

Pre-call plans *(see Chapter 4)*

Pre-call plans are useful to help you plan:

- **D** evelopment objectives
- **I** nformation objectives
- **S** ales objectives
- **C** hecklist of what you need for the call

When creating a pre-call plan, consider the following points:

Development objectives

- What actions do you need to take on this call to help you achieve your longer term goals with this account?
- Do you need to sell a concept as well as a product?
- How can you help the customer and strengthen your business partnership?

Information objectives

- Check your customer records – what gaps exist?
- Who are your competitors?
- Are there any specifics you need to find out that will help your progress and/or be of interest to your company?

Sales objectives

- Usual products, additional products, new products, promotional products? Likely objections? Best questions?
- What size order is a 'good' order for this customer?

Check

- Comments on customer record from last time
- Order forms, samples, brochures, price lists, quotations, correspondence and anything else you need to take into the call?
- Sequence of your presentation, eg what will you cover first, second, last etc?

It will also be useful if you:

- think long-term goals as well as short-term sales
- compare your plans with results after the call
- record the outcome of the call on the customer record.

Pre - Call Planner

Customer/Town/Date Contact Name	Developement Information Sales Objectives	Check List of items needed
INGHAM AND PARTNERS COVENTRY 1/3/9x	• Discuss factory contract • Agree pricing • Offer technical support / installation • Ensure our products specified. • Who is competition a) for them? b) for us.? • Show new range of fabrics.	New factory contract file Samples of suggested materials.
M+M Coventry Stanley Headown Arthur Murton	• Check stock in stockroom /shop • New designs at least 25% of designs brought. • Try accessories again. • Compare time sales - us v. Glidex + Regent Rail.	• Samples • New presenter
MITCHELL + ASSOC. COVENTRY	• Enjoy skiing holiday? • Harri's quotation - Explain benefits of technical spec. - Check price / timing • Show new industrial designs. • Any other contracts?	Harri's file. Industrial Samples

Record call outcome and notes for next call on the Customer Record Card

Prospect criteria/prospect code index *(see Chapter 5)*

Having new account criteria should help you to open quality accounts. To ensure that you always have this information to hand:

- Agree your company's criteria for opening new accounts
- Record this criteria on a page in your binder
- Agree codes for the various stages of prospecting specific to your company
- Record these codes in your binder together with your new account criteria.

Prospect Criteria Index

Company Criteria For Opening New Accounts:

A RETAIL ACCOUNTS

1. Medium - High quality outlets only
2. Credit check via chief accountant
3. Discuss with manager before opening
4. Must have potential for long term business
5. No minimum order

B CONTRACT ACCOUNT

1. Mi...

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Prospect Code Index

Example of Prospecting Stages & Definitions:

Code	Definition
E	Enquiry
B	Brochure Sent
Q	Qualified Prospect
A	Appointment
I	Initial Call
F	Follow-up Call
D	Demonstration
S	Site Visit
P	Proposal
O	Order

Prospect overview *(see Chapters 5 and 7)*

A prospect overview should give you an at-a-glance visual progress picture of 30 or so prospects and help you with self-diagnosis of areas for prospecting skills improvement. To create a prospect overview:

- List the names of all your prospects
- Write the names of all your current prospects
- Where possible, note the date of your last call and add the appropriate code from your prospect code index (see above)
- Simply add the date and code for all subsequent prospect calls.

Within a few months you will have a good picture of your prospecting strengths and areas for development. Use this overview in conjunction with your quarterly summary for self-diagnostic purposes.

Prospect Overview

Company Name Town		Activity Code & Date								
PROSPECT 1	Code	E	B	Q	A	F	F	P	O	
	Date	10/5	10/5	14/5	21/5	18/6	16/7	17/7	21/7	
PROSPECT 2	Code	I	NOT suitable							
	Date	12/5								
" " 3	Code	E	B	Q	A	D	P	O		
	Date	24/5	24/5	26/5	2/6	6/6	7/6	10/6		
" " 4	Code	E	B	Q	A	P	O			
	Date	31/5	31/5	4/6	6/6	8/6	17/6			
" " 5	Code	E	B	Q	A	F	F	F	P	O
	Date	2/6	2/6	4/6	18/6	16/7	14/8	21/9	23/9	8/10
" " 6	Code	E	B	Q	A	S	F	P	O	
	Date	14/6	14/6	17/6	29/6	21/7	8/8	12/8	17/9	
" " 7	Code	E	B	Q	A	F	F	F	F	
	Date	21/6	21/6	24/6	13/7	11/8	17/9	3/11	5/12	
" " 8	Code	I	F	F	S	F				
	Date	29/6	31/7	28/8	30/9	28/10				
" " 9	Code	E	B	Q	- Not suitable					
	Date	14/7	14/7	20/7						
" " 10	Code	I	D	P	O					
	Date	27/7	3/8	4/8	6/8					
" " 11	Code	I	F	D	P	O				
	Date	2/8	4/9	18/9	20/9	7/10				
" " 12	Code	E	B	Q	A	F				
	Date	18/8	18/8	21/8	3/10	18/11				
" " 13	Code	E	B	Q	A	F	P			
	Date	30/9	30/9	4/10	18/10	30/10	3/11			
" " 14	Code									
	Date									
" " 15	Code									
	Date									
" " 16	Code									
	Date									
" " 17	Code									
	Date									

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Prospect records *(see Chapter 5)*

To build up a picture of each prospect's business and to record comments that will help you on your next visit, it is a good idea to create a system of prospect records.

These should be similar in format to customer records, but with more space for buying procedure and competitor information.

Prospect Record Card

Company THE JOHN ADAMS PARTNERSHIP

Address SUITE 3, PLASTOW PLACE
HENLEY-ON-THAMES
OXON

Post Code RG9 1LT

Prospect Number 28

Telephone (0491) 717171

Fax (0491) 720000

Source of lead REFERAL

Annual Turnover ?

Number of Employees 8

Type of Business/Account Category DESIGN CONSULTANCY
– Specialise in Hospital sector contracts

Parent Company Information Private Company

Contacts' Name	Mr/Ms/Mrs +initials	Title/Position	Ext. No.	Best Time /Best Day (if any)
JOHN ADAMS	MR	Senior Partner		Not
JEAN CROFT		Partner / Senior Designer		Tuesday
HELEN SOAMES	MRS	Contracts Manager		Mornings
GILES		I.C. Studio		(Meeting)

Product Information - See Product Code Index

Product/Service group	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Products Bought ✓		✓	✓	✓	✓	✓	✓		✓							
Potential Volume		(12 HOSPITAL CONTRACTS LAST YEAR)														
Potential Value																

Buying Procedure Extensive personal contracts in S.E. England Area Health Authorities / NHS Trust Hospitals. Likes to tender each contract working with one supplier on tracks and colours / designs.

Competitor Information Glidex and Regent Rail contract divisions main source. Not too happy with Glidex reliability. Regent rail contract division recently re-organised.

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Product benefits plan *(see Chapter 6)*

To help turn product features into customer benefits, the examples given in Chapter 6 may be useful as a guide.

This can be especially useful with new product launches and for new salespeople.

Product Benefit Planner

Feature	Advantage	Benefit
What It Is	What It Does	What It Does For The Customer
Varied fabric designs	° Appeal to wider range of customers. ° Attract more customers to shop	° More orders / more profit ° More satisfied customers. ° Enhanced reputation.
24 hour delivery on factory stock.	° Means you can carry less stock	° Less cost tied up in stock ° Reduces borrowing need. ° Means more profit.
Design Consultancy	° Enables you to offer a wider service to your customer / client	° You don't have to employ your own consultancy. ° Only pay for what you need. ° More cost effective. ° More profitable for you.

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Weekly call summary *(see Chapter 7)*

Most companies find it useful to track progress with sales by means of a weekly call summary. For large numbers of calls per day, some organisations prefer this to be daily, whilst a few others find monthly summaries sufficient.

We suggest that you consider:

- Keeping things as simple as possible
- Asking for minimal rather than maximum information
- Making it quick and easy to complete (see the tick column example)
- Selecting those pieces of information which are of importance to your organisation, using the example as a guide.

Weekly Call Summary

Finishing Mileage   Name

Starting Mileage   Sales Area

Business Miles   Week Commencing

Dates	Customer/Town	Calls ✓	Orders ✓	Order Value	No. Prod. Grps	Pros pect ✓	New Account ✓	Other Activity Codes ✓
1/3	INGHAM + PARTNERS Coventry	✓						
	M + M Coventry	✓	✓	£214	4			
	MITCHELL + ASSOC. Coventry	✓						
	CARTMELLS Rugby	✓	✓	£432	1			
	GRAND DESIGN	✓				✓		
2/3	FINE PLANS Newport Pagnell	✓						
	JOHN LEWIS Milton Keynes	✓	✓	£1008	3			
	C.R. ASSOC. Milton Keynes	✓						
	M.K. HOSPITAL	✓						
	FRINTON FABRICS	✓	✓	£296	2			
3/3	SIOBLE DESIGN Reading	✓						
	JOHN LEWIS Reading	✓	✓	£2409	4			
	JACKSONS Reading	✓	✓	£193	1			
	PRESTIGE PROPERTIES Reading	✓				✓		
	GRAHAMS Henley	✓	✓	£562	2			
	TOTALS	25	9	£6,156	25	4		

Transfer these totals to the Quarterly Summary

Sales graphs *(see Chapter 7)*

Graphs are especially useful to show sales performance versus targets graphically, for overall sales or any particularly important market sector or product group that you want to monitor closely.

Choose what you will graph and set up the graph axes, eg timescales and percentages sold. Draw a line or curve from zero to target to show where you should be at each stage of the sales campaign, and plot actual progress alongside.

Sales Graph

Title: RETAIL / DOMESTIC
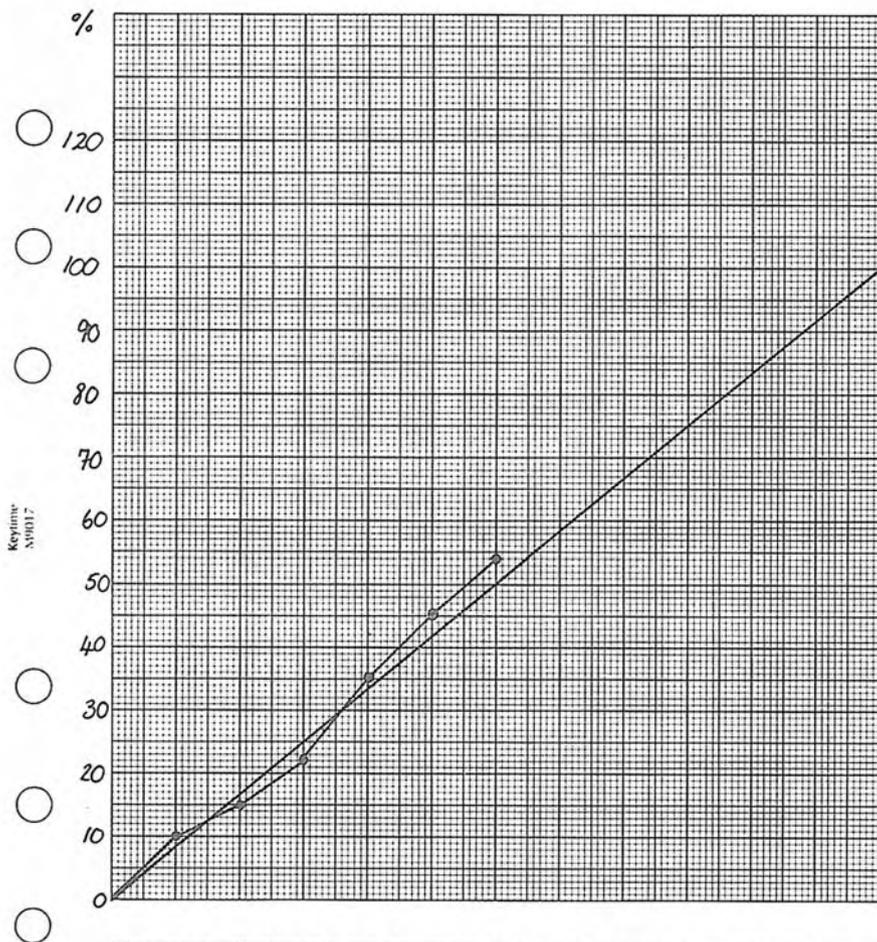
Period	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Target	27·9	55·8	83·7	111·6	139·5	167·4	195·3	223·2	251·1	279	306·9	334·8
Actual	29·3	53·1	79·8	112·5	143·2	180·8						
%	8·8	15·9	23·8	42·8	42·8	54·0						

Notes: % = % of total 12 month target (£334,800)

Quarterly summary *(see Chapter 7)*

At the end of each quarter, you can monitor progress and performance by creating a quarterly overview, as described in Chapter 7. This feeds off the weekly figures during the quarter. However, some companies find it more convenient to work off monthly figures and a rolling 12-month summary.

Either way, it will enable you to:

- Record performance against important key ratios
- Compare performance versus company norms and personal bests
- Monitor lost accounts
- Self-analyse your overall sales strengths and areas for improvement.

For each ratio you want to monitor, you need to determine how you will measure it.

Exercise:

- Using the examples shown opposite as a guide, decide which are the key ratios you need to monitor for your business.
- Agree company norms or expectations for some or all of these.
- Set up the system and review your performance regularly.
- Focus on improving specific aspects of your sales performance on an ongoing basis.

Quarterly Summary

Quarter Number **2**   Year **1999**
Name **DAVID SCOTT**

Purpose : To record Achievements v Company Norms and Personal Bests
To identify Areas For personal improvement
To provide an objective basis for Performance Appraisal

Line No.	Performance Indicator	Calculations	Company Norm	Personal Best	1	2	3	4	5	6	7	8	9	10	11	12	13
1	Total orders This Week (TW)				7	12	11	9	8	6	11	9					
2	Total Orders Cumulative (Cum)				7	19	30	39	47	53	64	73					
3	Average Orders Per Week	2 ÷ No. Of Weeks	10	11.1	7	9.5	10	9.8	9.4	8.8	9.1	9.1					
4	Total Calls TW				20	24	27	25	24	25	23	24					
5	Total Calls Cum				20	44	71	96	120	145	168	192					
6	Order: Call %	2 ÷ 5 × 100	40.0%	43%	35%	43%	42.1%	40.1%	39.1%	36.6%	36.6%	38%					
7	Total Order Value TW				4716	5302	6158	5921	6002	5801	4927	5431					
8	Total Order Value Cum				4716	10018	16176	22097	28099	33900	38827	44258					
9	Average Order Value	8 ÷ 2	£600	£64.1	£674	527	539	567	598	640	607	606					
10	Prospect Calls TW				1	3	3	4	3	5	6	5					
11	Prospect Calls Cum				1	2	5	9	12	17	23	28					
12	Aver. Prospect Calls Per Week	11 ÷ No. Of Weeks	5		1	1	1.7	2.3	2.4	2.8	3.3	3.5					
13	New Accounts TW				0	0	1	0	1	1	2	0					
14	New Accounts Cum				0	0	1	1	2	3	5	5					
15	Aver. Calls Per New A/C	11 ÷ 14	5	4.8	-	-	5	9	6	5.7	4.6	5.6					
16	New Business Volume TW				} TAKEN MONTHLY FROM COMPUTER PRINT OUT												
17	Total Business Volume Cum																
18	New Business % Of Total	17 ÷ 8 x 100	10%		} * CRUCIAL IN												
19	Proposals/Quotations TW				} NOT APPROPRIATE IN SOME INDUSTRIES, * CRUCIAL IN OTHERS												
20	Proposals/Quotations Cum	14 ÷ 20x100	7.5%														
21	Proposal Conversion %																
22	No. Of Product Groups TW				31	29	28	31	22	35	38						
23	No. Of Product Groups Cum	23 ÷ 2			51	80	108	139	161	196	234						
24	Aver. No. Of Product Groups		4.5%		2.9	2.7	2.8	3.0	3.0	3.1	3.2						
25	No. Of Overdue A/C TW				} TAKEN FROM COMPANY CREDIT INFO / LISTINGS												
26	Total No. Of Accounts																
27	% Of Overdue Accounts	25 ÷ 26 x 100	4%	2.87%													
28	Business Miles TW				763	892	880	907	873	944	832	794					
29	Business Miles Cum				763	1655	2535	3442	4315	5258	6088	6882					
30	Average Miles Per Order	29 ÷ 2	100		109	87	84.5	88	92	112	95	94					

Notes * Last column in weekly call summary can be used for eg proposals / quotations

Personal development plan (*see Chapter 10*)

A personal development plan should help you to plan and monitor your personal development against a comprehensive checklist of competencies required in your job.

Exercise:

- Create a personal development plan as described in Chapter 10

- Having prioritised your needs, write out what action you will take and set target and review dates

- Discuss your development plan with your manager. Seek his or her input and help as needed

- The Personal Development Form opposite was based on the original Sales National/Scottish Vocational Qualification. This was revised in early 1999.

Personal Development Form

Codes - 0 = No Competence Or Experience. 1 = Some Competence. 2 = Fully Competent

Unit/ Element	Description	Need In this Job ✓	Comp- etence 0,1,2	Priority No.
	(Based on sales National Vocational Qualification Standards for levels 2 & 3 selling)	All ✓		
2.0	Forecast, monitor and evaluate personal sales performance			
2.1	Forecast personal sales performance		1	
2.2	Monitor and evaluate individual sales calls to enhance performance			
2.3	Monitor			

Personal Development Form

Codes - 0 = No Competence Or Experience. 1 = Some Competence. 2 = Fully Competent

Unit/ Element	Description	Need In this Job ✓	Comp- etence 0,1,2	Priority No.
	(Based on sales National Vocational Qualification Standards for Levels 2 & 3 Selling)			
9.0	Makes a sales presentation		2	
9.1	Investigate and establish customer needs and interests		2	
9.2	Prepare for a sales presentation		1	
9.3	Give and evaluate a sales promotion			
10.0	Negotiate sales		0	①
10.1	Plan and prepare for the negotiation of sales		0	
10.2	Establish the conditions necessary to successfully negotiate sales		1	
10.3	Formulate and make proposals to agree the terms of sale		1	
10.4	Negotiate and agree the terms of sale			
11.0	Design and implement a sales plan		0	②
11.1	Design a sales plan to achieve organisational objectives		1	
11.2	Implement sales plan			
22.0	Contribute to the collection and use of marketing information in order to meet organisational sales objectives		1	
22.1	Obtain and evaluate marketing information		1	
22.2	Make recommendations for the marketing of products or services			

Unit/ Element	Action To Be Taken	Target Date	Review Date	Achievement date
10	• Accompany manager on Anderson contract - Preparation + Negotiation	2nd Q	By 30/6	
10	• Accompany manager on other negotiation calls	2-3rd Quarter	30/9	
10	• Read "Getting to Yes" - Fisher + Vry	30/9		
	• "Getting past No" - Vry		30/6	
	• Investigate sales NVQ	Oct/Nov		
11.1	• Sales manager to discuss sales plan production on a field visit.		30/11	

Keytime A99018

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Meeting plans (*see Chapter 9*)

A meeting plan should serve the following purposes:

- To help plan, run or contribute to effective meetings
- To help implement actions agreed at meetings.

As well as formal meetings, meeting planners can be used very effectively for ad hoc meetings with colleagues or customers. When writing a meeting plan, you should make sure that, at the very least, you consider:

- Timings – how long do you need or have?
- A clear purpose or objectives for the meeting
- People – should anyone else be present?
- Decisions – what is agreed to be done by whom, by when?

When decisions are taken at meetings, consider who should know about it who is not present. Agree who will inform them, how and by when.

Meeting Log

Decisions	Action By	Target Date
• Target all main Regent Rail accounts following their re-organisation	Me	Next Meeting
• Wembley – 8th Nov. for me, Pete + Helen		
• Visit to Banbury Factory Demo on motorised ~~~	All	12/4

Meeting Planner

Subject SALES MEETING   Ref.

Chaired by AHB
Start 10:00am
Venue Bell Hotel, Watford
Present All team except Jenny.

Date 7 April
Finish 4:00pm
Tel No. (0923) 414141414

Main objectives • NEC Exhibition Review
• Spring Sales Plan   Achieved

Other objectives • Sales training course follow-up sessions   Achieved

Keytime 12005

Agenda – Items for AHB   Estimated time
• Regent Rail – Target their accounts?
• Dates for Wembley Exhibition – Who? / When?
• Any training on how to demonstrate motorised track?
• Presentation on opening good retail outlets   15 mins.
                                                        Achieved

Preparation required
Last month's sales print-out
'Buckingham' latest sales, figures for AHB
Article on N.H Trust Hospital contracts

* Overhead projector slides for presentation.

Summary implementation checklist

For the quick introduction of a *Filofax*-style paper-based system, develop an implementation action plan, based on the following checklist. Set yourself target dates to have each item on the list up and running.

Review your progress against your action plan regularly. For example:

- Daily for the first week
- Weekly for the first month
- Monthly for the first quarter
- Quarterly for the first year

Define:

- Call frequency criteria
- Product codes for recording and monitoring
- Prospect criteria
- Prospecting stage codes
- Sales targets and objectives for month overview

Transfer:

- Dates from existing diary, wall planner charts etc to portable year and month overviews

Create:

- A customer record for each customer
- A prospect record for each prospect

- Key account plans for agreed key accounts

- Sales graphs for major targets

- Personal development plan for you!

- Product benefits for agreed products

Use:

- Monthly overviews to record appointments

- Pocket diary as a satellite system to record appointments when main binder not carried, eg socially

- Weekly call plan for the following week's calls

- Pre-call plans for call objectives

- Customer records for recording information and helpful notes

- Weekly call summary to list achievements

- Quarterly summary to analyse key performance indicators

- Sales graphs to monitor progress versus major targets

- Meeting plans for major meetings

- Seven-part file for managing paperwork

Before the introduction of a computerised or part computerised system, use the following sales audit questions to help clarify what you have and what you want:

Guideline questions for a sales audit

Suggested questions and comments

Do you have a system, which enables your sales people to monitor and manage their own sales performance?

Need a complete review of present system to involve, empower and thus motivate their team and help their sales managers.

Are your sales targets imposed on or agreed with your sales team?

Need to gain acceptance of targets by sales team? For suggestions on how to involve them, see page 26.

How accurate have your recent sales forecasts been? What impact has this had on stock availability, customer satisfaction and profitability?

For help on sales forecasting – see page 23.

How are your sales team reminded on a daily basis of their various targets and objectives?

Need for an Objectives Overview mechanism eg *Filofax* Monthly Objectives Form – page 27.

Do your managers and sales people know how to get S.M.A.R.T.E.R. targets? – Specific, Measurable, Agreed, Realistic, Time-bound, Evaluated, Reviewed.

Help on setting objectives – page 27-28.

Do your sales team and sales managers use Action Plans to ensure achievement of key goals?

Help in action planning eg *Filofax* Performance Objective forms.

Is your average miles per order going up or coming down? Are you happy with this?

Is this a worthwhile measure of sales force effectiveness in your industry? If it is, do you need help to monitor and improve it? Pages 33-36.

How important in your industry, is being expected, by having an appointment? What overview do you have of your sales team's appointment schedule?

Need for a visual overview from either a Month Overview form or an electronic system – see pages 114-115.

How confident are you that your sales people spend their time where the money is? That is, do you have a system that ensures your people call according to volume and potential?

See call frequency guidelines – pages 122-124.

What system do you have to monitor planned call frequency with actual?

See call frequency overview – pages 124.

If your sales team have to make face-to-face calls with some customers on a regular basis are they able to:

- *Call on different customers at different call frequencies?*

- *Ensure they are in each main sector of their territory at least once per week to handle emergencies?*

- *Allow for any seasonal variations in order patterns?*

- *Enable prospect calls to be fitted in with existing calls?*

- *Use the 'petal system' when applicable, to minimise mileage ie travel out in the morning, are at the furthest point by lunch time and travel back towards home in the afternoon, following a petal-like shape?*

- *Make it easy to plan in sales meetings, courses, exhibitions and holidays?*

- *Help you to minimise your miles per call and miles per order?*

Is there a need for a geographic journey plan?
Pages 33-37.

How capable do you feel your sales team is at planning and prioritising their time? (This is a widespread weakness in sales forces according to a UK survey.)

See time management skills in Chapter 3.

Are you happy with the amount of messages, requests, communications etc that 'slip through the cracks' due to poor 'follow-up' methods by some or all of the sales team?

Consider an organiser with a notes or communication section, to replace post-its, scraps of paper etc.

Might you and/or your sales team benefit from a weekly call plan of intended appointments and activities?

See the weekly call plan – pages 120-121.

For your top ten customers, do you have objectives, strategies and action plans to retain and develop the business?

Consider key account planners – page 126-127.

Do all your sales team keep customer records which are up-to-date, helpful to them and valuable to the company? And when a salesperson leaves, are the customer records an important part of the hand-over?

See customer records – pages 118-119 and ensure there are documented termination procedures.

Do your sales people always prepare clear objectives of what they want to achieve from each call?

Pre-call planners – pages 128-129.

Does call preparation routinely include objectives to help develop the account and fill in information gaps as well as just sales objectives? Is there a checklist of what to take into a call?

See pre-call planners – pages 128-129.

Do your sales people always make notes on each call that will help them on their next visit?

See customer records – pages 118-119.

Do you have a method of monitoring the average number of products sold to your customers?

See customer records – pages 118-119.

Do you know what percentage of your account base you lost last year? (Boosting retention by two per cent has the same effect on profits as cutting costs by ten per cent.)

See quarterly summary pages 142-143.

Do you set criteria for opening new accounts or will any account do?

See new account criteria – pages 58-59.

What method do you have to monitor the progress and stage reached with every prospect?

See prospect overview – pages 132-133.

How and where do you record information about each prospect?

See prospect records – pages 134-135.

Are you able to diagnose prospecting skill needs from your present methods? (For example, a survey found general weaknesses of too many calls per prospect and too many small accounts being opened.)

See key ratio questions – pages 71-74.

Do you have a product knowledge checklist to help ensure each of your sales team (and support team) is sufficiently knowledgeable about your products and services?

Consider a list of brochures etc with accountability – page 64.

Can all your sales and support team give the benefits rather than just the features, of each of your products and services?

See product training methods – page 65.

Is there a list of best responses to common objections?

See answers to objections – page 65.

Is the right amount and quality of product, market, customer and competitive information getting through from the sales team to the appropriate people in your organisation?

See communication matrix – pages 68.

What are the key sales ratios which are important in your organisation, such as order to call ratio, average calls per new account, proposals to order etc?

See key ratios – pages 71-74.

How do you systematically drive up your company's sales performance?

See key ratios – pages 71-74.

Have you established company norms for your key ratios to help compare individual performances?

See key ratios – pages 71-74.

How do you motivate your best people to 'go the extra mile' and exceed company norms?

See personal best – page 75.

Are your sales people able to organise their paperwork in a simple and effective way?

Consider a paperwork organiser and the paper handling techniques mentioned on pages 78-81.

Is your sales team able to file and retrieve items quickly, easily and consistently?

See the filing system outlined on pages 81-83.

Have you ever sought structured feedback on the effectiveness of your sales meetings and how they might be improved?

Use the meetings checklist on pages 86-87.

How do you and your sales people ensure meetings, including one-to-one meetings, are kept focused, to the point and productive?

See pages 89.

Do you have a sales-specific checklist of competencies against which you can measure the training needs of each of your team?

See the personal development form – pages 144-145.

Are there any other specific requirements that your system needs to offer for your particular organisation?

Use any company and/or industry-specific needs.