

PROFITABLE PRINT RELATIONSHIPS

The Successful Print Sales Circle

Video 9: Sales Diaries

Hello, welcome to the second of the Sales Foundation videos, where we're working on creating all the right systems to make sure that you can work as efficiently and effectively as possible. And I want to start this video with a little story. As many of you know, I used to work at a major publishing company in the UK when I was buying printing services. And as you can imagine, as one of the UK's leading publishing companies, I received a lot of calls from printing companies who were keen to work with me. Now, in order to work more efficiently, I used to review certain parts of my supplier base at different times of the year.

And often the person who was ringing me up had, through no fault of their own, picked the wrong time of the year to make contact with me. So I say, "Thanks for ringing. I really don't want to speak right now, but if you ring me back in whatever month I was reviewing that part of the supplier base, let's talk then, send me some information then, and I will be carrying out some purchasing activity at that point, so that's the best time for you to have a meaningful conversation with me." So every single person who made contact with me got that information, but how many do you think then rang me back or emailed me at the time I'd asked them to do this? And the answer is very, very few. And these printing companies were throwing away the chance to have a conversation with me that I'd offered them to see if they might be a good fit and to see if there were opportunities for us to work together. So why didn't they make the call? Why didn't they make that contact?

I can only guess it's because they weren't efficient. They said, "Yes, I'll phone Matthew in this month," and then wrote it down somewhere and never looked at it and forgot about the conversation. That's the only reason I can think why they wouldn't make contact with me when I'd ask them. So today's video is all about making sure that you're running an effective sales diary because in my years of training many printing companies, I'm constantly surprised at how few people do actually run an effective sales diary. And many people who've tried to do it are sometimes disadvantaged by the systems that they're forced to use as well. So today, we're going to talk about being really practical about how we do this. When you run a sales diary and you use it in the right way, you're maximizing your chances of building great relationships with prospects and with existing customers, because you're always contacting them at the right time.

You never forget to make a contact when you should be making that contact. In addition, you keep a much better control over your sales pipeline because you've got in your sales diary when you should be making contact, when the right time is that the prospect might be making the purchase, and

you're ringing them at the right time. And of course, that means that you're going to achieve much more in your sales time, and actually, you're going to use that time more efficiently, because you're ringing people at the right time when they're ready to buy. So that means less wasted calls because you're not having pointless conversations at the wrong time, and you're not forgetting to ring people and therefore needing to find more prospects when you might've had someone there ready to buy had you contacted them when they'd asked you to. Now, the basis that I run my sales diary on is on a principle called the never-ending task.

That might seem something that you really don't want to have, it's always good to be able to tick tasks off, but bear with me as we go through the process, and I think you'll see how effective it can be. But before we get there, let's go into step one. And step one is to choose the right platform for your sales diary. There's four ways that you can take this. The first one is to use a specific tasks app that's really built to make managing tasks and reminders as efficient as possible. I personally use an app called To Do List, and there's a link to it in the worksheet if you want to try it out. There's a free version and then a premium version if you want some more of the functionality. I really like this app, I mean, there's others like it, but I really liked this app, partly because it's not tied to any device, it's in the clouds, so I can log on from my phone, my iPad, my computer, my laptop, or someone else's device if I need to get ahold of something quickly as well.

I also like it because it's up in the cloud, so it syncs automatically. And I like the way it's structured, it makes it very easy for me to work as well. There is a price to pay with it, but these sorts of apps are really good if you want to start creating different tasks around projects, if you want to start delegating amongst teams, then these sorts of apps really come into their own. But they're not for everyone. And another way you can do it is just to use the notes or the reminders system that comes with both Apple and Microsoft. The functionality isn't quite so good, but it's a great way to try this sort of thing out if you're not quite sure about using this system to begin with. The cost is nothing. The functionality isn't quite the same. You might not be able to log in from all your devices depending on what you have, but it'll pretty much do the job fairly well for you.

Number three, is to use your company's CRM or MIS system. And some of you may be forced to use this anyway, because it's part of the company policy. Now, some systems are absolutely great for managing your sales tasks, reminders, and others you may struggle to really run an effective diary. Yeah, I've heard lots of stories about it being hard, or very slow, to put in information, that you have to be logged into a device to actually get hold of anything, which can be frustrating, and that you can't log in remotely on some systems, and that I understand, makes life really hard, but you may just have to follow company policy.

If that's the case, do consider running a reminder app for yourself, as well as the CRM system, and that can get around some of those issues. But as I said, some of the systems are really good, so certainly don't discount them. And the fourth, is the old school way, is to use a paper diary. And I mentored lots of people who still want to use pen on paper, which is great because paper is what we're all about, isn't it? So you can still do it the old school way. It's slightly slow with a diary, there's more writing involved, it's less automatic than an app, but if you have an A5 page-a-day diary, you can run a perfectly acceptable sales diary in that way. So let's move to stage two.

And stage two, is to start entering tasks into your diary. Without any sales tasks, your diary is pretty pointless, really. So every time I talk to a prospect or a customer, and I'm going to make contact with

them at a later stage, I enter that into my sales diary. And if I get a new prospect, it may be on my list of people to contact in the near future, they go into the diary as well. If I was using a diary, I'd enter their name on the page of the date I wanted to contact them. If I'm using an electronic system, I enter their name and I enter the dates where I want the reminder to make contact with them. So at this point, no one can fall off the list because each day, I either open a diary and see the list written down in front of me, or I log onto my app and I see the list of things that I have to do for that day.

And I sometimes add other information as well. So I might want to put down something that I've mentioned in a previous conversation, if I've quoted them a price, or if I've said I'll do something, and I'll also maybe want to write down any personal details, maybe they're going on holiday, so I know not to contact them for a little while, but also that's a reminder to check with them whether they had a good holiday when I next make contact with them. So I've given you a little checklist again on the worksheet of things that you might want to add at this point. It's easier to do this with this system on an electronic system. If you are using a diary, it can be a little harder because you might have to write out these details more than once because of the never-ending task system, and you'll see why in just a moment.

Now, the other thing to say at this point is it's not necessarily the time I'm actually going to email or call that prospect. I might write a reminder in to say that I've promised to send them some samples when a job comes off the press, or that I'm going to send them some information and I'm still waiting for some feedback from colleagues. So it might be that I put my reminder to contact them in for a couple of days time when I have that information, and then I'll move the task on with the date of when I'm actually supposed to contact them. Stage three, is to make the contact. That's the bit we're all used to. And there's three things that can happen on the day you're supposed to make the contact. Number one, you contact a prospect and that's brilliant because they're there, they respond to you by email or they give you some time on the phone, that's brilliant.

Number two, you try and contact the prospect and they're not available for whatever reason. And number three, it's one of those days, and you never get round to making the contact because you were just too busy. And all of those things will happen to us frequently, but whatever that outcome, we still move to step four in exactly the same way, because step four is to make your sales contact a never-ending task. So what do I mean by a never-ending task? Basically, I never want to tick anything off on my sales contact list, unless I'm absolutely convinced that I'm wasting my time chasing that prospect. Pretty much the only time I will take someone off, is when I've made that decision. If someone says, "Please don't contact me."

And I think there's still a good chance, I'll keep them in the system. To make this never-ending, basically means that we're never crossing a task off our list, we are simply moving the date. So let's take each of the examples that I gave you in step three, let's say you contacted the prospect and you had some dialogue with them, and there'll be a next stage of that dialogue, either you've got to send a quote, or you're going to phone them back in a month's time when there's a project coming up, whatever that response is, you move your task to that new contact date. If you're doing it in a diary, you'll cross their name out in the diary, you'll go over to the new contact date and write them in again, that's where it can get a bit annoying if you had a whole load of useful information in the diary as well.

If you're on an electronic system, you don't tick completed on the task, you simply enter a new due date instead, and it will move to the right day for you. If you try to make contact with a prospect and they weren't available, well either you'll have some information that they're off ill perhaps and not back for a few days, or you just didn't get through to them today, just move the contact date to the next time that you've got space in the near future to make some more sales activity. And finally, if you have one of those days and you didn't get to contact the prospect, then move that on in the same way as if the prospect was absent, move it to when you know you've got some sales time. The idea is that by the end of your day, you would have reached task list zero.

You would have either completed, but much more likely, moved on all your sales contacts to new dates. That's the aim of what you're doing. And that really covers the idea of the sales diary based around the never-ending task system, but there is more that you can do with it. So step five, is to consider expanding the system into other areas. So you may want to put down other tasks that you carry out on a regular basis. I find this very useful for social media activity, so I have regular tasks to check my engagements on different platforms and they're all on my task list. I also use it for personal reasons. One thing I have is that I've got a reminder of when I put the recycling out every two weeks, because otherwise I forget. You may also find it useful if you have regular times when you need to check in with other team members, or if you need to carry out any administrative functions such as reporting or invoicing, all of those things go very well on to a never-ending task system.

And this is where an electronic version really comes into its own because you can set recurring tasks on electronic task system. So on To Do List, I can set a task for every Tuesday and Thursday, when I catch up with my LinkedIn engagements, or I can set a task for every other Thursday, which is when I have to put out the recycling. And then all I do, these are marked as recurring tasks, so instead of moving the due dates, I simply click down on that task and then it's automatically moved to the next date I have to carry it out, so that's a very useful piece of functionality. I hope you found that useful and given you some ideas on how you can make your sales contacts more organized. Step six, you know what it is, it's share your success. So again, I'd love to hear how you're getting on with the idea of sales diaries, and if it's helping you make your life more organized, or even if you've been doing this already, if this is a slightly simpler system that makes life easier for you.

Again, I've got your task for you, and your task for this video is to make sure that you choose a sales diary platform, be it your CRM, be it Apple Notes or the Microsoft equivalent, a paper diary, or an app like To Do List. Choose your system and set it up. Then enter at least 10 times when you're going to contact different prospects. So 10 prospect contacts to go into your diary. And finally, I want you to check in every day with your diary to make sure you're either entering new information, or moving due dates. Again, at the end of the worksheet, there's a tick list to show that you're carrying on and carrying this out, you might find that quite a good visual prompt as well. Next week, we have the group call, so I'm really looking forward to finding out how you're all getting on with this task. I'll look forward to talking to you then.