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Optimize Time Utilization or Costs? What Does the Coach Say?

As new reps at an ERP software company, we were struggling with the product story, finding opportunities, getting resources, competing. Then a comrade found himself with a live one. He had developed an important sponsor and strong backing. The focus shifted to Europe. His hunch said go, the prevailing guidance was to interact with the European sales team. The deal was lost when control of the account was dissipated.

The trade-offs for optimization in time management, in travel planning, in costs savings are not ever worth a lowered focus on the prospect. He should have gone, he should have said I need to go; he should have been convinced that his instinct to stick with the prospect was paramount. If he had had a strategy, he might have convinced management that going to Europe was essential. Other professionals have responsibilities for cost control, for travel expenses, for organizational arrangements, but the rep is the professional to focus on the prospect.

Would any document have demonstrated to management that the rep was convinced the next steps were directly in line with the goal of closing business? Do professionals with plans look more professional?

A strategy shows what needs to be done, but also what does not need to be done. It is the best vehicle to discuss the most effective next-steps among many possibilities. It is a space for the rep and the sales manager to share their points of view. The rep is very close to the campaign with detailed experiences, and the manager has access to many reps, their campaigns, their approaches. Together they can optimize the strategy. As time goes on, a rep and manager can periodically review the campaign's progress by seeing what has been done, what was planned to be done but has not been accomplished, what new influences have produced newly planned activities, what has happened to the close date, the sale amount, the percentage of probability. The manager might even provide recommendations to the rep for possible next-steps or comments on planned activities.

In this space the rep is focused on the prospect. It is a new focus because the campaign space does not exist now; there is no forum, no technique for driving a rep's attention into a strategizing process that stays cohesive.

Time management tools are so pervasive that we see them as a metaphor for our professional lives. Time management tools diffuse campaign focus as if time were the only commodity we need to manage. What happens in a campaign is the rep's primary responsibility and should be his/her primary focus, and time management should be a secondary focus as should cost control.

Because the selling process is dynamic, normal planning tools will not work. The record-keeping approach of CRM/SFA is not enough.

With more thinking invested in the campaign, good ideas will emerge that shorten the sales cycles, expand revenue, and win sales. The net value will be to make forecasts more accurate because the rep will be working on what it takes to close business.

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