

CUSTOMER/PROSPECT ORGANIZATIONAL CHARTING FORM

There are two things to look at in maximizing the opportunity of capturing more business from your current customers...one is *people* and the other is *products*. This sales/organizational tool addresses the *people* side of the equation. The basic idea here is that more than one *person* is likely to be involved in buying printing/copying at any company or organization, because more than one *business function* has printing/copying needs.

Consider this...*every* business or organization is involved in at least three core business functions: production (creating a product or service), marketing (transferring that product or service into the hands of a user in exchange for money) and administration (keeping track of the entire process.) To these three core functions, we can add several more key “sub-functions”—for example, purchasing and operations within the production function; sales and product management within the marketing function; and human resources and accounting within the administration function. Each of these functions is likely to have some printing/copying needs, and experience has shown that in all but the smallest companies and organizations, more than one person is likely to be involved in buying this printing and/or copying.

That’s not to say that each function has it’s own printing buyer(s), there may very well be some overlap. But the challenge for a printing salesperson is to make sure that he/she knows all of the players within each customer organization. Think of it this way, if you don’t know all of the players, you’re bound to be missing out on opportunities!

The Customer/Prospect Organizational Charting Form is a tool which will help salespeople to develop a “big picture” understanding of sales opportunities relating to multiple printing/copying buyers within existing customers. (Hopefully, you will also realize that this tool has value with prospects too!)

Here’s how to use this tool. Start with your Top 10 customers, and write the name of each company or organization on its own copy of the form. Then simply “fill in the blanks”—asking your current contact(s) for assistance in identifying the key players in whatever business functions they are not responsible for. Remember, any individual may wear more than one “hat” in his/her company or organization—Mr./Ms. Big and/or one of the “key assistants” might very well also be the decision-maker in one or more business functions—but as a salesperson, you can’t afford to assume that you have all of the bases covered. Put at least one name in every box, and you’ll have gone a long way toward ensuring that you’re not missing any opportunities!

Once you’ve completed charting your Top 10 customers, start on the next ten, and then the next ten, and so on. And don’t forget that this tool has value with prospects too.

The Customer/Prospect Organizational Charting Form also features a listing of some of the most common printing/copying “products” used in each business function. This is to help you home in on specific opportunities. Don’t just ask a decision-maker if he/she has any printing or copying needs, ask direct questions about specific products or services! “*Tell me about how you communicate with your employees,*” you might ask the human resources decision-maker. “*Do you put out an employee newsletter, or an employee handbook or a manual?*” If the answer is yes, the next step is to learn more about the specifics of those projects and (hopefully) talk about how well they match your capabilities.

NOTE: The six business functions listed on the Customer/Prospect Organizational Charting Form are largely self-explanatory, with the possible exception of “product management.” It might help you to think of this as the “marketing” department, responsible for such things as advertising, public relations, the development of all sales promotional literature, etc. In large companies with sophisticated marketing functions, the people who make such decisions are often called “product managers.” In smaller companies, a single individual might be responsible for the printing needs

of both the sales and product management functions, but don't assume that! In many companies or organizations, "sales" and "marketing" are two different animals. The most important consideration for you as a salesperson is that both of these "animals" are likely to have printing/copying needs!

Please also remember that the purchasing function may or may not be responsible for the purchase of printing and copying. The "gatekeeper" may tell you that you have to go through purchasing, but the truth may be that some other printing salesperson is getting a lot of orders directly from individuals responsible for other functions! Please also consider this...if you're not getting anywhere with a purchasing agent, you probably have nothing to lose by approaching the people directly responsible for other business functions. And it has been proven in the marketplace that the closer you can get to the "originators" of any printing/copying, the more likely you are to succeed at building the kind of relationship that's based on value (as opposed to price!)