

It May Seem Disorganized, But I Know Where Everything Is!

I took a photo on a recent onsite visit. It was the cubicle of the company's top salesperson. He assured me that it only looked disorganized, and that in fact, he knew where everything was. So I bet him that he couldn't find a hard-copy document I sent him two or three weeks earlier. Lunch was on him that day!

At the end of the day, I sat with the owner of the company in his own office, which was also fairly messy. On his wall, he has a poster which states that "A Clean Desk Is The Sign Of A Dirty Mind." I pointed at his desk, and at the poster, and said "I'm not sure you're setting a really good example for your employees, especially Carl (the top salesperson)."

"I don't care about neatness," he said, "I care about results, and Carl brings in a lot of business."

The question, of course, is whether he could be bringing in even more if he was better organized. What do you think?

Everything In Its Place

The secret to organization is simply to put everything in its place. If that place really is on the top of your desk — or on top of your chair! — then that's where whatever we're talking about should be. But if it's not, it should be somewhere else. That might be a file folder, in a file cabinet, in a file room. It might be a digital folder, on a computer desktop, or somewhere deeper inside the file structure. It might be in the trash! I'm not saying that your desktop, physical or digital, must be perfectly neat and organized at all times, but here's what I want you to ask yourself: *Is there any upside to the kind of mess you see in this picture?*

Now ask yourself this: *What would Carl likely find if he took the time to look through every piece of paper in his workspace?* I think he'd find that most of the documents are no longer current to his workflow. I think he'd also find some lost opportunity!

Lost Opportunity

This is really the critical issue. I've been saying for a long time that selling is mostly about follow-up. And please understand, I'm not just talking about persistence. I'm talking about follow-up that's appropriate to the situation at hand. I have seen far too many printing salespeople miss out on opportunities because they were *blindly persistent* when they should have employed something more creative in terms of follow-up, but that's a topic for another day. For today, it's pretty simple. If you miss an opportunity because you didn't follow up on time because it was hidden under the clutter in your workspace, that's an indefensible loss.

I actually forced Carl to dig through his clutter as part of the follow-up to my onsite visit. He found 5 quotes that he'd never followed up. He also found 23 leads that he'd never followed up on. He even found a job jacket for an order that had never been put into production. He swears that he's seen the light, and that he's going to get himself and keep himself better organized. I'm confident that if he does that, he will bring in even more business and make more money.

Contact Management Software

I use a software product called ACT to keep myself organized. It's in a category of software referred to as CM (Contact Management) or CRM (Customer Relationship Management). I prefer the term Contact Management, because a typical printing salesperson's database will be made up of suspects, prospects and customers, but no matter what you call it, I think every salesperson should be using this kind of tool. The category also includes product like Outlook, SalesNet, and salesforce.com.

In ACT, I've set up a database record for everyone I do business with or hope to do business with, and in that record, I can store everything from names, addresses, phone numbers and e-mail addresses to the notes I take during every call or contact. I can send e-mails from ACT and store them in the database record. I can attach quotes, artwork, or any other digital file. I can also schedule my follow-up activity after each contact. In other words, ACT gives me a place to put everything in its place.

Next month, I'll write more on how I use ACT every day, and how it's also my primary Time Management tool.