

ACT More Organized

At the end of last month's column, I promised to write more this month about how I use ACT as my primary Time Management and Organization tool. I have been using ACT for 20+ years, and I often tell people that I couldn't run my life without it, let alone my business. I also know people who are similarly dependent on Outlook, SalesNet or salesforce.com. The point here is that it's not the specific product, but rather the capability that is so important to printing salespeople.

Follow-up Machine

I got some strange looks from attendees at a recent seminar when I told them that they'd never gain new customers from prospecting—this coming right after an hour long segment on prospecting strategy and technique. "If you really think about it," I said, "you don't gain new customers from prospecting, you gain them from follow-up, and the reason for prospecting in the first place is to find people and companies that are worth following up on. It takes time and effective follow-up to build the kind of relationship that leads to success in printing sales!"

ACT—or Outlook, or SalesNet, or salesforce.com—can be your follow-up machine. As I wrote last month, I've set up a database record in ACT for everyone I do business with or hope to do business with, and in that record, I store everything from names, addresses, phone numbers and e-mail addresses to the notes I take during every call or contact. I also send e-mails from ACT and store them in the database record, and I attach quotes, artwork, and various other digital files. Most importantly, though, I also schedule my follow-up activities after each contact.

Simple Process

The process I follow is pretty simple. After each and every contact with one of my suspects, prospects or customers, I ask myself two questions. First, what should I do next to follow-up on what happened today? Second, when should I do it? From there, it's just a couple of mouse clicks and a little bit of typing to put the next stage of my marketing plan for that suspect, prospect or customer into ACT. Once I put it in and assign it a date, ACT will remind me on that date. Like I said, it's a pretty simple process.

Here's where it can break down, though. It's not enough to schedule your activities into your Contact Manager, you have to be in it every day to get real value out of it. I start every day by calling up my calendar and task list in ACT, so I can see what I've put on my plate for that day. My next step is to prioritize all of my tasks, and that can be an adventure.

Yesterday was a good example. My list contained 37 tasks: 4 meetings, 5 "to-do's" and 28 phone calls. In ACT's daily calendar view, I had the meetings blocked out with the amount of time I expected them to take. From there, I started "blocking in" the rest of my tasks. My basic thought process was this: "How can I jam all of these tasks into the hours of this day?"

On this particular Monday, I could see right away that was not going to happen. Too many tasks, too little time! So now my thought process was: "Which of these tasks are the most important ones?" In other words, the ones most likely to put money in my pocket!

(OK, I realize that you may not be motivated totally by money, but I hope you'll recognize that making money is the end result of doing everything right in a sales job. That means everything from prospecting effectively to making great presentations to managing your time effectively to closing the sale. Consider this, too; if you're an employee, making money is the end result of doing what your boss wants you to do, and what your co-workers depend on you to do. Even if *you* don't want or need the money, don't forget your obligation to others!)

A hard-working salesperson will always have more tasks than time. That's perfectly OK, as long as *prioritization* takes place and the most important tasks are completed. That's the most important of the many things ACT does for me. Sadly, I think most printing salespeople end their days with low priorities completed and high priorities left undone. Those salespeople make less money than the ones who end their days the other way around.

Now the big question for today: Which of those salespeople do you want to be? I think I know the answer, and I think ACT or Outlook or SalesNet or salesforce.com could be as helpful to you as ACT is to me. And if I were you, I'd schedule some time to look into those products, and decide which one is best for you.