

Do You Have A Follow-Up Machine?

I just lost an argument with a software guy.

I was trying to convince him that his product, a CRM program, was flawed. They tried to make it simple, and in many ways succeeded, but in several very important ways, I think they failed. Which is too bad, because I would really like to find the perfect CRM program for my clients, and it doesn't seem to exist.

As I have written before, I use ACT! as my own CRM, and I often tell people that I couldn't run my life without ACT!, let alone my business. But I also tell them that ACT! is a product that can do 100 things, and I only need 8 of them. In my experience, the sheer bulk and complexity of ACT! and other products like salesforce.com keep many salespeople from committing to a CRM. And that is truly sad, because this kind of software should be the backbone of any printing salesperson's sales efforts.

What's It All About?

I say that because, at the most fundamental level, selling is all about getting someone to the next level. That may mean getting a raw suspect to respond to an e-mail or voice mail. It may mean progressing from an e-mail exchange to a face-to-face meeting. It may mean converting a quote to an order, or getting an actual customer to buy more from you, or give you a few referrals. Until someone becomes a Maximized Customer, there is always a next level, and I think you want to get there.

All of *that* means that selling is about follow-up. Follow-up is how you get people to the next level. And the most important function of a CRM is to be a follow-up machine.

Two Questions

Here is some very fundamental sales strategy. After every contact, or every attempt at contact, with anyone you are selling to, or trying to sell to, you should always ask yourself two questions. Question #1: *Based on where I think I stand right now, what should I do next in terms of getting this person to the next level?* Question #2: *When should I do that?* In other words, how and when should I follow up on what just happened?

That gives you a plan. Now you need a place to store your plan, and a way to remind yourself to execute it. That's what a CRM/follow-up machine can do for you.

I had an interesting conversation during an onsite visit last week. One of the salespeople I was working with stated that more printing sales opportunities are lost to price issues than anything else. I thought about that for a while and decided that I disagree. Yes, sometimes it's a Price Monster situation. (That's my term for people who make all of their buying decisions based strictly and only on who offers them the lowest price.) But just as often, it's a situation where one salesperson outsold his/her competitors. The distinction I'm drawing here is that, many times, the salesperson who "lost" was never really in the competition, so there was no real opportunity.

There might be some of that in what I'm going to say next, because I think more printing sales opportunities are lost because they fell through the cracks than for any other reason. In other words, no plan and no follow-up.

Bottom Line

The bottom line for today is that selling is really pretty simple. Identify an opportunity. Follow up on that opportunity. Sure, there's complexity in each individual selling situation, but the fundamentals are not complicated at all. What do I do next? When do I do it? What is the next level? What is the appropriate follow-up?

One more thought for today. Selling is still a numbers game. The more opportunities you identify and follow-up on, the more successes you will have.

I have 300+ suspects, prospects, customers and Maximized Customers in my ACT database. I add to and subtract from that database every week. I don't succeed with every opportunity, but I *never* lose out on one because it fell through the cracks.

Gotta go now. I have to figure out what to do next with my software guy.