5 If you leave it to chance, chances are you'll just leave it.

Top tips on prioritising for success in sales

Key terms used in this report:

- *beyond the TO DO list*
- *In-Your-Face projects and targets*
- *Post Appointment Time-On*
- *Stay in touch time*
- *The weekly review*
- *Emails & Phone Calls "Off-Line" Time*

Introduction:

If you leave it to chance, chances are you'll just leave it. This might seem a little negative, but our research and experiences have shown that many salespeople struggle with being able to prioritise and manage their time effectively.

This special sales report provides you with ten top tips on how to get more out of the same amount of time that we all have. Some of these tips are obvious, simple, well tested, proven and you're probably using them already. Others however, you may not be using, or may not be using consistently.

Let's start with an obvious one, and yet one that is not consistently practised by all salespeople.

Beyond the TO DO list

Depending on the type of business you are in, I've always found that a typical to do list becomes too full and you need to go through and prioritise too many things and it all became a little difficult. So what I've found (and the many salespeople that I've recommended this to have also found) is that segmenting my to do list is a real advantage.

Now whether you use an electronic planner or pen and paper doesn't really matter….there are arguments for the benefits of both, however, categorising your to do list can really help you prioritise and clearly plan your days.

For example, my personal to do list has the following categories:

- Proposals to write: Now depending on your line of work, it may not be proposals, but rather letters confirming orders or the like.

- Phone calls to make: I personally block time out each day to make my calls and to return phone calls. Of course there are variations to this where something needs to be more spontaneous or urgent, but having this type of systemised approach allows a certain flexibility. How much time you will need to put aside can only be answered by yourself.
- Phone calls expected: I want to know who I am expecting calls from so that I know that if they haven't returned my call by the end of the day, to action these return calls for tomorrow

- Notes to: I set time aside to write personal handwritten notes to thank, congratulate, or provide value-add information to my clients (there's more on this powerful sales and communication principle later in this report)

- Follow-up activities: These are the activities that I have diarised to be acted on based on any interviews or meetings that I have completed. The initial follow notation is made on the client interview notes that I keep for each client and then, as appropriate, shows up in my diary reminding me that it needs to be listed in my 'to do' follow-up activities

- Projects: Once again, depending on your type of work, you may not need a projects section on your to do list. I use this for any research or development that needs to be done, articles that I might be writing, or products that I am working on. Usually projects that are listed here have deadlines that I have targeted and I allocate a set amount of time on the days that they are listed on the projects section of the to do list – this might range from 30 minutes on one project and maybe more on another. It all depends on what the project is and the deadline that I am working toward.

- Personal: While some people disagree with this, I have found it much easier to have any personal 'to do' activities noted on my business to do list. Not that I would recommend doing the personal activities in business hours, but it's just good to know what needs to be done that day in all aspects of my life.

The To Do list is something that takes discipline, motivation and a method or system that works for you. Without it however, there's a large chance that you will be leaving things to chance, and the chances are that you will just leave it.

In your face projects and targets

This is not for the feint hearted, but for those people who are motivated by visuals, this will be something that will really work, and help keep you focused and on the right priorities.

In my office I have what I call the Projects & Targets Chart. It is one large piece of flip chart paper that is stuck on the wall. The basic idea is to have in large colourful words (and pictures or graphics if you like) any specific targets or goals that I am working toward, and the major projects that I am working toward. I also draw connecting lines to show graphically how each item (target and project) affects each other.

Like I've said, this won't be for everyone, but I like to be reminded and keep focused on goals. This visual has worked for me exceptionally well. Look for the principle and maybe it will work for you too.

Post Appointment Time-On

I used to refer to this as my post appointment time-off, but I came to realise that 'time off' didn't really highlight the importance of the concept.

Post appointment time-on is the time that I really focus on what needs to be done as a result of any appointment I have just completed.

For me, I usually try to find a nearby café, and I will buy a juice, tea or coffee, depending on the time of day and how I'm feeling, and take about 10 minutes to reflect on how the meeting went. I use a planning and review interview form that helps me to do this.

The planning side of the interview form helps me to think about the objective of the call, what I already know about the particular client or prospect, and some questions that I think I might ask. I then use the form to take notes during the actual interview. Following the appointment I use the review side of the form to help me reflect on how well I went using the ***BASICS of selling***® steps. This covers off questions like:

- How well did I ***B***uild rapport, gain trust and connect with this client?
- How well did my ***A***sking questions help me and the client to identify and clarify any needs or wants that I might be able to help them with?
- How well was I able to ***S***how value that I could create for this client through presenting a solution, strategy, program or products?
- What obstacles, issues, objections or concerns was I able to ***I***dentify and to what extent was I able to overcome these to move toward a win-win situation?
- Was I able to ***C***onfirm the sale and provide the client with a checklist of the next appropriate steps for them to receive the value we had discussed.

- What follow-up action is required and how will I ***S***tay in touch with this client to demonstrate to them that I value their business and in some way be able to deliver more than they expect and create a 'wow' experience for them?

That last question listed in my review process is the link to ensuring that not only do I promise what I can deliver, but more importantly, that I deliver on my promises. It's during this post appointment time-on that any follow-up action is noted and diarised.

I live by the rule if it's not in the system, chances are it will be left to chance. My memory isn't that good…so I don't want to leave important follow-up action to chance.

Now as you read this, you may not have the time to take 5 or 10 minutes at the end of each appointment or interview. All that I would recommend is that you consider the amount of time that you will actually save by developing this discipline of reviewing each call.

Stay in touch time

Each day or at the very least once a week, set aside time (it might be 30 minutes, it might be less or more), to take action on your 'stay in touch' strategies.

Staying in touch with clients is about looking for opportunities to write, send, contact or somehow reconnect with existing clients in a way that will send loud and clear messages that you value their business.

If you're not staying in touch with your clients in a systemised way, chances are you'll be leaving it to chance, and as I've said a few times in this report, if you leave it to chance, chances are you'll just leave it.

I use this time to consider four or five key clients, their interests, hobbies, or things that I've learned about them that are important to them.

I am constantly looking for articles, books, upcoming events or something that will be of interest to that particular client and when I find something (and I don't always), I will send them a note with the article or details of the event or a reference to a book or website that they might be interested in.

We can spend a lot of time on ‘busy work’. However, taking a focused and systemised approach to this activity is not busy work.

It’s important work that will reap you much reward and the reality is, although this may or may not be true for you, but for me, this is an activity that I get a lot of enjoyment out of.

I enjoy it because it keeps me focused beyond just the business relationship and really helps me (without ever being intrusive or getting too personal inappropriately) forge deeper relationships with those clients who are very special to me and my business.

The weekly-review

At the end of each week, or at the start of each week (personally I like the end of the week), set aside 15 minutes or so to review your wins, newly discovered opportunities and reflect on any setbacks that you’ve had.

We can learn so much through this self checking process. The days, weeks and years fly by quick enough – slow them down by grabbing hold of those important lessons and achievements and asking yourself:

- How can I replicate this win that I've had this week?
- How can I ensure this set back will happen less in the future?
- What have I learned this week that will help me achieve my goals?

This exercise becomes even more valuable when you can share your reflection and learning with others on the same path.

Emails and Phone Calls "Off Line Time"

This may be a little controversial for some, however, I recommend that you turn your emails and phones off and where ever possible, block out specific times to make and receive calls and to review and send emails.

I know that in some business situations this is just not practical, however, I know of many successful sales professionals who do just this – regardless of industry.

It's amazing how quickly clients and colleagues can be 'trained' to accommodate this method of doing business. It's also a much better and focused use of your energy and time. Think of the number of times you are distracted through the day by unexpected calls or emails that you find yourself getting immediately involved with answering or acting on.

All I'm suggesting is that you try to block out time to do this and do it in a more focused way. You might choose to read and respond to emails the first thing each morning.

You might choose to read emails as one of the last things you do in a day, but to not take action on them, and rather allocate time for the following day, or when appropriate. You should manage your time, and not be at the beck and call of emails. Once again, there will always be variations or exceptions to this rule, but try it – you will be pleasantly surprised at how much time and effort you will save. In terms of phone calls, you could operate a similar system to the emails.

Divert your phone to your message bank service and respond to calls when you have allocated the time, not just when they arrive. When you think about this tip, it really does make good business sense. It just takes a little courage to actually do it.

Summary

These tips are at the top of my list in helping me to prioritise my incoming and outgoing sales and marketing activities. This special sales report is not intended to be an exercise in time management skills, rather it is to provide you with some specific sales oriented points of focus that will help you prioritise and gain the most out of making your day more productive.