

The Most Valuable Sales Lesson.

A salesperson's organizational skills are directly related to their effectiveness in their role.

Uncommon Value

March/April 2021

I learned a valuable lesson during year 1 of my sales career that I have carried forward and used to forge a 30-plus year career in this industry. That lesson was the importance of being highly organized in how a salesperson sets up their territory, manages their territory, and manages their time. Frankly, I did not learn this lesson immediately and almost found myself out of a job early on due to issues with my performance. Many skills are necessary to be considered a sales pro, but I believe salespeople must master their organizational skills in order to be effective at their jobs. How well a salesperson is organized is dependent on many things, including a calendar, task list, a place to take notes etc. For purposes of this column, I will focus on one tool that I developed myself and was extremely useful to me. I called it a Customer Contact Log.

My territory at the time was probably a lot like many of yours: well over one hundred customer accounts, targets, and prospects to keep up with. What I did not have was a tool to make sure I gave each of these entities the attention required to build and maintain a successful sales relationship. People were falling through the cracks and not receiving the attention they deserved. I realized this after a contentious conversation with a sales manager who, not so delicately, hinted that my days with the company may be numbered because my sales volume was approximately 15% below budget. With necessity being the mother of invention, I created a Customer Contact Log.

I went to an office supply store and bought a 12-column accounting ledger book. I listed every active customer account and prospect down the left-hand side and each column represented a different month. At the end of each week, I would look back at who I interacted with and check them off as "seen" for the month. I would

then use the list to create a plan for who to see the following week... those without a check for the month. There were immediate and residual benefits to this action. Immediately, I felt in control of my territory and my future, something I had not totally felt until that moment. As I used the Customer Contact Log weekly, I felt very confident that I was seeing the customers necessary to successfully build my business. Over time, the paper-based log was changed to an Excel-based log and eventually added as a sales tool company-wide for the organization I worked for at the time.

There is more to time and territory management than just a contact log. You will need a calendar, a task list that is prioritized daily, a place to keep notes, and a place to list prospects and track their progress towards becoming a customer among other tools. All this information will need to be convenient and easy for you to use consistently. And here's the rub: I don't think we ever reach the mountaintop in terms of organizational skills. You can always get a little more organized than you are today. It requires consistent effort, reflection on your daily activities, and a willingness to be a little self-critical.

Very few companies in this industry have adopted a time and territory management system for their sales teams to use. For that reason, salespeople are left to their own devices. Sometimes that's fine, other times it's not. Often, when I've seen salespeople struggle in this business, it comes down to how well they manage their time and territory. Here's the truth of the matter: If they don't get that figured out, they will continue to struggle no matter where they're working. I am particularly passionate about this subject and would be happy to discuss it with anybody who may be struggling in this area. My contact info is shown. Reach out and let's talk about it.



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