

Sales Tip #1: Call Cycle Management

Goal: Maximize Territory Coverage and Prioritize Relationship Management Activities by developing a Call Cycle Plan.

- Message to Sales Managers: In today's economy, many of our clients are finding themselves in a position where they have to maintain customer relationships and territory coverage with fewer sales resources. A Call Cycle Management approach can help ensure that your sales organization can maintain high levels of productivity and market coverage at the lowest possible cost of sales.
- Best Practice
 - It is critical to stay in touch with the customers, prospects and centers of influence who can help drive transactions in your territory. Yet it's hard if not impossible to stay in touch with everybody all of the time. So you need a plan. Here is a simple exercise to help sales people develop a call cycle plan that they can execute against effectively.
 - Rate your contacts "A", "B" and "C" (or use some other rating system that you are accustomed to at your company). Then decide how often you would like to stay in touch with each group of accounts or contacts. For example, you may decide to call on your "A" accounts once a month, your "B" accounts once a quarter, and your "C" accounts twice a year. Make separate A, B and C account lists, and mark off when you have contacted each account. Re-run your lists from scratch based upon your call cycles (re-run your A Account list once a month, your B Account list once a quarter, etc.)
- How Salesforce.com can Help
 - Create custom list views based upon last activity date. Filter first on the rating field to create different list views for each group of Accounts or Contacts (based upon their rating). Filter next on last activity date to show only the records where the last activity date is less than the call cycle time, or where there is no recorded activity at all.
 - Sample Filter Criteria:
 1. [Rating] equals [A Account]
 2. [Last Activity] less or equal [LAST 30 DAYS]
 3. [Last Activity] equals []Advanced Filter: 1 AND (2 OR 3)
- Note: Ask HarvestGold about our Call Cycle Management (CCM) product. With CCM, users can create their own custom Call Cycle Plan records in Salesforce.com. CCM automates the process defined above by monitoring Last Activity Dates and automatically scheduling and updating activity tasks based upon the user's specific Call Cycle Plan.