5563 Calle Ocho
Carpinteria CA 93013
408-666-7356
jim@carpedata.com
www.carpedata.com

Point of View; Be a Better Sales Manager using JOBZ!

JOBZ! has a well known point of view: the workflow of the sales rep.

In addition to the basic process of submitting RFE's, Proposals and Orders, JOBZ! includes tools that enable a sales rep to stay organized by tracking jobs and contacts. These tools are available from the Organize pull-down button that appears on nearly every screen. For example, there is a crucial difference between Pending sales and Working jobs, or between jobs that billed last year and jobs that will ship this month.

And when prospecting, you need to quickly list the people it is time to call again, or those you have contacted recently.

These and many other organization tools essentially allow a sales rep to manage themselves, and much of the value of JOBZ! can be realized by a sales rep working on their own in JOBZ!

But if you have JOBZ! running on a server, used by an office full of sales reps and CSR's, these same tools can help you be an awesome sales manager, because your point of view is expanded to include all of those reps.

So let's say that your sales force is using JOBZ! and you want to be a better manager. What does your morning look like?

(We will ignore interruptions about that big rush job that won't fit in the press schedule, and the order that is held up in credit, and the catalog that was mailed to the wrong list.)

Start your day on the Home screen by running Organize > Pipeline. Of course, each sales rep can run their own Pipeline, but remember, your point of view includes theirs.

So you see at a glance what the current month looks like, and what the next couple months are shaping up to be, including not only the work that is already in production, but quoted jobs that have a decent chance of turning into orders. It is sorted and summarized by sales rep as well as month.

You note that one of the reps is barely represented in the Pipeline. You drop him or her an email and ask them to bring in their own copy of the Pipeline for a chat. Yes, you can also run their individual Pipeline yourself, but you want them to think about what they are doing.

Now let's take a look at ALL the jobs that have been quoted recently, but not sold, whether or not they have been indicated as likely sales by the sales rep. The Pending > Recent Pending report summarizes these jobs by sales rep, and sorts them by decreasing value, so the bigger ones are at the top.

You note that one of your reps has a lot of quotes for one particular prospect, but none of them have an indicated percent of likelihood (which would cause them to appear in the Pipeline.) It might be worth a conversation about why this is, and what we can do about it. Should we go in lower to get them on board? Are they just wasting our time using us? What is our strategy here?

Or let's say you see a nice big job for a customer you have had for many years, but the percent of likelihood is very low. Why is that? What can we do to improve our chances?

You can do all of the above over your first cup of coffee, even with some interruptions, and you haven't even left the Home screen. Now let's take care of some prospect management.

Pull down Recent Contacts from the lower section of the Home screen. OK, lots of activity here, which is good. Now pull down Organize > Recent Calendar for a day-by-day, rep-by-rep view.

How about looking at upcoming contacts? Pull down Organize > Scheduled Contacts. Sort by any of the underlined column headers, including Since Last, to see people who haven't been called on in possibly a long time.

For that matter, pull down Organize > Missed contacts, to see people whose Next Contact Date has slipped into the past.

All of these reports are essentially byproducts of simply following the normal workflow of quoting jobs and contacting prospects. And keep in mind that they can be run by the sales reps themselves, so you build upon their own self management, and encourage it, when you use these tools yourself.

When the time comes to shake things up by re-assigning some contacts to other sales reps, there is an incredibly easy way to do this, one at a time or in bulk. You can also encourage the reps to check out the Shark List and to challenge an assignment if they think they can do better.

Finally, let's wrap up your morning by preparing the mailing list for the quarterly Newsletter. This is so simple! Because you have instructed your sales reps to select the Newsletter segment for each of their contacts to be included in the mailing, all you need to do is a quick FIND for those contacts, and pull down Output > Export Data to send an Excel spreadsheet to the mailing department.

There is much more. For example, the Budget process, where each sales rep goes through their contacts and predicts what they will buy throughout the year, then when they (or you) run Organize > $ Plan, you see the biggest sales targets at the top of the list, and how well you are meeting those goals.

But you get the idea. JOBZ! can help you be an awesome sales manager before you've even finished your second cup of coffee.