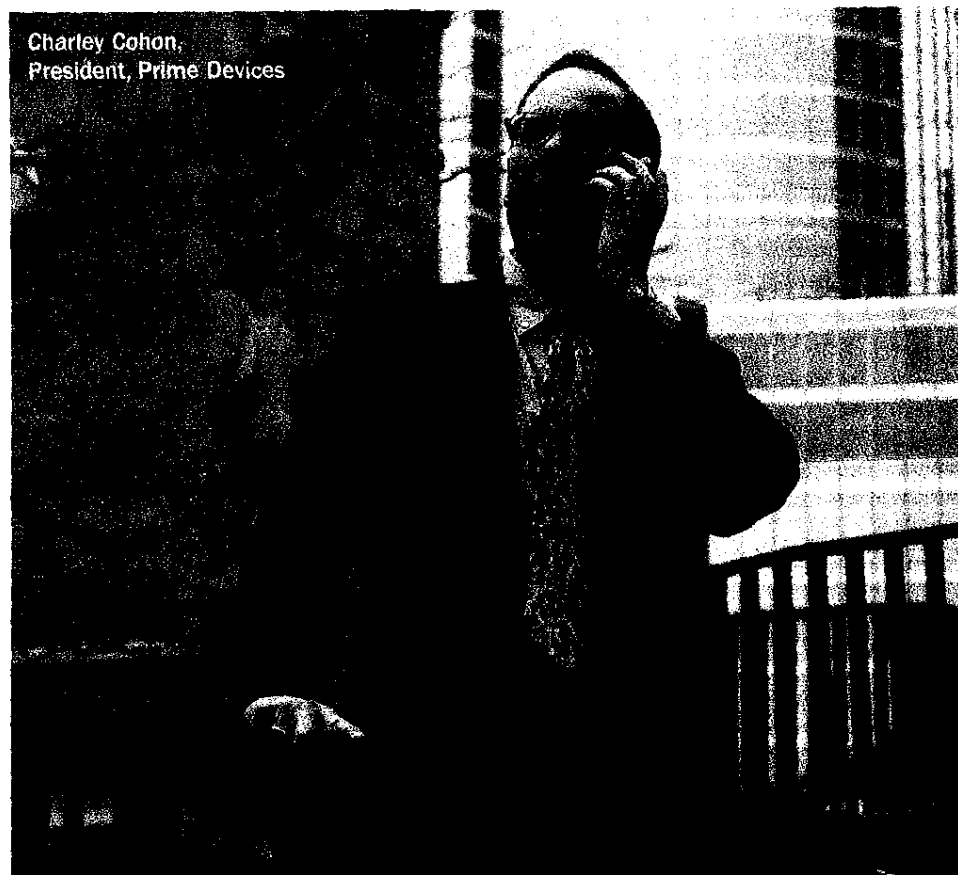


# ideas

## that pay

A Hands-On Guide for Sales Managers



Charley Cohon,  
President, Prime Devices



### THE BACKGROUND

Prime Devices, which sells electrical products for major manufacturers, has automated its call reports and mileage and expense reports, lifting time burdens from its field sales force. The company is getting more hours per day of true selling, higher revenue, more contented reps, and higher retention. Prime Devices President Charley Cohon says he has better control over his reps and better information on prospects to keep his manufacturers confident of Prime's efforts.

## Automated Reports Boost Sales Productivity

### The Problem

In late 2000, Prime Devices faced a common sales problem. Its four reps were supposed to turn in call reports each Monday on the prior week's calls. But reps often delayed writing these reports until well after the calls were made. As a result, their memories were not fresh, and reports were incomplete. Some reps took time during sales hours to write the reports, losing valuable sales time. Others did them at night or on weekends, subtracting from family and personal time. Everyone was spending too much time, often miserably, writing frequently inaccurate call reports.

### Finding a Solution

Cohon wanted a better way. He thought giving his reps laptops might help. But laptops take a couple of minutes to boot up and still require

several minutes of typing. Cohon has always looked for reps who are hungry to see prospects and sell, not eager to write reports. Cohon heard of a telephone company that offered a dedicated phone number just to receive and retrieve voice mail.

He decided reps would call in their reports, which would be transcribed by a clerk in the office. They would also call in mileage and note any expense events for proper reimbursement. He rolled out the new system in January through June, 2001, starting first with Eric Anderson, a working rep and sales VP of Prime.

### Making It Work

Prime's four reps are expected to make their first sales call at 8 a.m., sell as long as anyone will see them through 5 p.m., and spend a half-day per week in the office, except for



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Anderson, who has a full office day for other duties. When reps head out the door for the first call, they speed-dial the dedicated number and call in their odometer readings. They call mileage in again as they arrive at their first call, along with the prospect company's name. As they leave that prospect, they take a minute or two to report on their cell phones the results and do the same after each call of the day.

These telephoned call reports are brief – one paragraph – and take only a minute or two. Ambiguous words are spelled out for the clerk's clear understanding. The rep also notes any action items, such as sending a catalogue. Every rep follows this mandatory procedure immediately after every call.

Back at the office, the clerk transcribes the reports, on the same or next day. Any action items are taken care of by office

*The manager knows where every rep is at every minute of every day. And who they've seen and what was discussed.*

staff. The text report is cut-and-pasted into Prime's CRM system, Goldmine, which retains the last 10 calls on each prospect. Goldmine also notes when action items are dealt with. Both Cohon and his reps have immediate access to these 10 reports on their Palm Pilots. Written versions are printed out and saved for reps to review during their half-days at the office. And reps can check Goldmine on their Palm Pilots before the next call on each prospect.

One clerk handles all the call reports, mileage, and expense reports for four reps and has time left over to help answer phones and do customer service. Full-time, the clerk could probably support six reps, Cohon estimates. Reps must only bring in expense receipts on their office half-day to back up any business lunches or other events they have already called in.

### Results

Every rep now spends from 32 to 36 hours each week seeing prospects or driving between prospects. Anderson says he makes six to seven calls each day. Sales

*A dedicated phone number allows reps to speed dial call reports, mileage, etc. and saves time on making written reports on their laptops.*

numbers are strong.

When reps get home, they are free of administrative work. Retention challenges are eased. The average Prime rep has been with Cohon for 12 years.

Cohon knows where his reps are at all times. The clerk's initial transcription yields a chronological log of how and where each rep spent his day, because each call report has a date and time stamp. All Cohon requires is simple honesty and thoroughness in call reports. He understands if special circumstances, like a dentist's appointment or meeting with the kids' teachers, occasionally takes time out of a sales day.

When one of his manufacturers asks about a potential prospect, Cohon pulls out his Palm Pilot and, almost all the time, can report that a rep has called on the prospect, what date and time the call was made, who was seen, and what the results were. Because the call reports are now thorough and accurate, they strengthen Prime's relationship with the firms it represents. And if a question arises about service to a current customer, both Cohon and the rep know exactly what was said at the last contact and can resolve the question. One rep started writing business again with a disappointed account because the rep had exact knowledge of what had been promised earlier.

Saved time and tighter focus are the essential benefits. Cohon, who is also VP and treasurer for the Manufacturers' Representatives Educational Research Foundation, explains: "When one of my reps leaves a call, the only thing he should be thinking about is preparing for the next call. That is what great salespeople do. It is not good to break the momentum of selling. And people should not wake up wondering whether they should have coffee and fill out call or expense reports, then get out at 10:30. This way they roll out of bed and head for the first sales call." There is another gain: "The best way to get a CRM system filled up is to make it as easy as possible." – HENRY CANADAY