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Direct mail

Direct mail is one of the most common and recognised forms of direct marketing. This is posted mail that advertises your organisation and its products and services. Direct mail campaigns are generally organised geographically and sent to all postal prospects in an area, or to all prospects on a list. Common types of direct mail include catalogues and postcards.

Be aware of the benefits and disadvantages of using direct mail for prospecting clients, as shown below.



Benefit

The benefit of direct mail campaigns is that they encourage good prospect response rates by precisely tailoring messages to audiences and by allowing prospective clients to read your advertisement without being distracted by competing advertising.



Disadvantage

Direct mail will be unsuccessful if:

- the design is not well planned and prepared by a professional designer
- the material is not designed to have an impact on your particular target audience
- the messages are too long or confusing.

Databases

A prospect database is a repository of non-customer names and addresses that have been overlaid with descriptive data. This descriptive data may include demographic elements such as age, income, length of residence, marital status and children. Other elements may include mail-order responsiveness, buyer behaviour or special interests.

Databases are a valuable tool for organising and managing prospect information. A comprehensive and detailed database provides you with general knowledge about your target market, and also specific knowledge about individual prospects. Databases are especially useful for direct mail campaigns, as they allow you to efficiently create a mailing list for a specific promotion based on a range of identifiable data.

A major challenge for databases is the lag time between when the data is acquired and when the database is used. A more favoured contemporary approach is real-time proximity marketing: the localised wireless distribution of advertising content associated with a particular organisation.

Target your market

Today's clients change their product and service providers regularly, so organisations need to work hard to engage new clients, maintain existing clients and recover lapsed clients.

Researching your market helps you target your ideal client, identify new market opportunities and improve your sales performance. You can develop strong prospecting strategies based on what you find out about your clients, your competitors, your industry and the challenges in your marketplace, as well as identifying areas of your organisation that could be updated or changed.

The key is to find people who fit your ideal client profile. Remember that only those people who need your products and match your ideal client profile are likely to become prospects for sales. Do not waste your valuable time and money on contacts who are unlikely to buy from you.

Here is some information to help when you are contacting new clients, existing clients and lapsed clients.

New clients

Many organisations struggle to find new clients. Conventional approaches to prospecting, such as making cold calls or sales presentations, can be difficult and confronting for business owners who lack sales and marketing experience. However, there are a variety of other ways you can find new clients. With careful planning, you can improve your chances of success.

Conduct research about potential clients using newspapers, journals, magazines, public records or your organisation's prospecting database. Shape your potential clients' perception of your organisation by employing public relations tools such as media relations and advertorials, hosting business events or engaging in community relations.

Existing clients

It is important that your work to find new clients does not stop you from delivering a high level of service to your existing clients. Satisfied clients who enjoy good customer service bring repeat business and contribute a large percentage of your sales. They can also refer other buyers to your business.

Most people welcome contact from familiar businesspeople who make an effort to understand their needs and build a personal relationship. Increase sales to your existing clients by maintaining reliable client records and choosing simple, well-planned prospecting tactics. Social media are an effective way to reach clients who have already engaged with your organisation online. Consider joining business associations or attending networking events that you know your existing clients are also a part of.

Practice task 2

Use this table to identify three appropriate prospecting methods that match the market to which a product or service is targeted. Provide one example each for a potential client, an existing client and a lapsed client. The first one has been done as an example.

Client characteristics and status	Market segment	Product or service	Prospecting method	Predicted effectiveness	Potential cost
[Potential gym member] Example: males and females, health conscious, mid-high income, all ages, inner-city locations	Corporate females interested in stress management	Pilates classes	Brochures distributed in mainly female workplaces with specials for Pilates classes	200 brochures distributed with a 2% conversion rate equals 4 new clients	\$50
[Potential client]					
[Existing client]					
[Lapsed client]					

Consequences of not qualifying prospects

To avoid wasting business resources, you need to set aside unqualified prospects and concentrate your efforts on potential clients who are likely to yield a return on your investment of time, money and energy.

You do not want to spend time and effort promoting your organisation to people unless they are definitely interested in making a purchase. Many salespeople jump to their pitch too quickly, without having first gained proper understanding of their prospect's budget, authority, needs and time frame. Operating in this way will hurt your performance on several levels, as you will waste your time and effort chasing the wrong opportunities.

Here is a list of consequences of not qualifying your prospects.

Wasting time

If you're not qualifying your prospects properly, you will waste a lot of time following up and attempting to sell to prospects that are not a good fit for your organisation. Spend this time on qualified prospects and you will close substantially more deals.

Missing opportunities

Some of your ideal prospects may only become clients if you invest a certain amount of effort into getting them on board. If you don't know who those high-value prospects are, you will miss out on the chance to sell to them.

Closing bad deals

By not qualifying your prospects, you may successfully sell to people who shouldn't buy your product. This isn't just bad for the client you persuaded into a bad buying decision. Selling to the wrong client can also have negative effects for you and your organisation.

Ensure criteria measure buying potential

Make sure that established criteria for qualifying prospects represent a standard against which the buying potential of individuals and groups is gauged.

When you qualify your prospects, you are looking for some way to rank or sort them so you can prioritise your time for follow-up. Prospect scoring is a shared sales and marketing methodology for ranking prospects in order to determine their buying potential. You score prospects based on the interest they show in your organisation, their current place in the buying cycle and their fit with regards to your business.



Nurture

Prospects who are not yet ready to be contacted by a sales representative can be assigned to a nurturing campaign. These campaigns provide information slowly to a prospect, based on a pre-determined timetable or a prospect's behaviour, until they are ready to make a purchase.

Legislative requirements

Organisations that demonstrate legal and ethical conduct build strong reputations and earn long-term client loyalty. Legal and ethical conduct also protects your business from legal risks.

The Australian Competitor and Consumer Commission can fine, penalise or even close businesses that breach the fair trading and selling terms set out in the Australian Consumer Law (ACL). Every Australian state and territory has a fair trading regulator that administers and enforces the ACL.

If you do not adhere to your legal sales obligations, your business could be fined or forced to close. Take time to research your organisation's legal selling obligations in order to protect your business.

Here are some legal obligations relating to sales.



Australian Consumer Law (ACL)

Every Australian business has the same rights and responsibilities under the ACL.

Your state or territory's office of fair trading provides information on your legal obligations when selling goods and services, including:

- door-to-door sales and telemarketing
- lay-bys
- pricing
- pyramid schemes
- online sales
- referral selling
- harassment and coercion
- unsolicited supply of goods or services
- proof of transaction and itemised bills
- handling of uncollected goods
- consumer guarantees, such as warranties, refunds and repairs.

Example: gauge buying potential

Westona Incorporated is engaged in the design, manufacture and sale of integrated systems for biotechnology and environmental research. Westona's prospect scoring started with very basic measures, such as forms filled out, web page visits and email click-throughs.

As sales dependence on scoring data has grown, Westona has built on that activity-based scoring and now provides the sales team with product scores in eight major solution areas. Westona scores on very specific behaviours to increase the score for each solution area and also ties in nurturing for customised communications.

Increased visibility into prospect behaviour has been critical for the sales team, as the buying cycle for Westona's research equipment is on average six to nine months. Through using a sales insight software program to see account activity increasing rapidly for specific solutions, the sales team is able to predict which prospects are actively pursuing a product and so require timely follow-up.



Practice task 3

Consider the criteria used to qualify prospects by your organisation or one you are familiar with. Use the information in this table to identify and describe how you can apply prospect qualifying criteria to a particular prospect against which buying potential can be measured. The first one has been done for you.

Criterion	Description	What I know about the prospect
Budget	The prospect has the financial capacity or funds to buy from you.	The prospect is a \$4 billion company. After the second discussion, I told them the solution would be in the \$750k range and they said that made sense.
Authority		
Need		

continued ...

Sales productivity**Use tools for sales productivity**

A prospect management system easily monitors your sales teams' sales productivity by tracking activities and tasks that are proven to help close new business.

Performance metrics**Monitor performance metrics**

Using a prospect management system allows you to gain actionable insight into your entire sales process from lead creation to opportunity close, and to identify trends that will affect future revenue performance.

Account management**Manage client accounts**

Using a prospect management system allows you to effectively manage client relationships from prospect to close using in-depth client profiles to identify future revenue opportunities.

Salesforce productivity**Mobile salesforce productivity**

A prospect management system allows you to easily manage sales appointments, access complete account details, update sales opportunities and monitor key metrics from an electronic device, such as a smartphone.

Maintain prospect information

Prospect information is only useful if it is up to date. It is important to regularly check the accuracy of prospect information and update it when necessary.

Accurate data allows you to predict the future behaviour of your prospects and assess the effectiveness of promotions or campaigns run by your organisation. A well-maintained prospecting database allows you to generate information that will help you close a sale.

A prospect may be deemed inactive if there has been no prospect activity for more than a year. You should archive inactive prospects, rather than deleting them. If you decide to create a drip program that encourages inactive prospects to engage with your business again, the prospect can then be reactivated with all historical data intact.

Refine the system

Monitoring and evaluating the effectiveness of your prospect management system help you identify whether any changes should be made.

Do not hesitate to refine or modify your prospect management system if you find a more efficient way to achieve results. Regular evaluations keep you up to date and operating in a way that is beneficial to your organisation.

Often a fundamental problem relating to prospect record keeping is that team members do not use the systems and tools provided for them, despite best efforts to make the system fit organisational needs. Performance monitoring usually identifies whether this is an issue for your team.

Here are some ways to refine the prospect management system.

Refine your prospect management system

1**Review**

Review the system and tools to ensure that they are user friendly.

2**Training**

Provide training programs for management and staff on how to use the system efficiently and effectively.

3**Help desk**

Provide a help desk service to assist users.

4**Integration**

Integrate prospect record-keeping systems and tools into work processes so they are not seen as an onerous addition to work tasks.

5**Resources**

Allocate appropriate resources needed to maintain and improve the system.

6**Technology**

Regularly investigate whether new technology is available that may help improve the efficiency of your system.

3A

Establish consultation and communication structures with clients and supervisors

It is essential that you establish ongoing consultation and communication structures with your clients and supervisors when establishing an individualised sales plan.

Understanding your market is your first step in developing a good sales plan. To understand your market, you need to consult and communicate with existing clients to establish their motives for buying your product or service, as well as their buying behaviours. This helps you focus your sales efforts on potential clients with specific, ideal client characteristics.

Your supervisor will guide you on how to establish individual sales goals and quotas to focus on work activities, based on organisational sales and marketing objectives. Your supervisor will also collaborate with you to develop an individual work plan that monitors your sales performance.



Consult and communicate with clients

Before you start promoting your business, you need to know what your clients want and why. By researching, consulting and communicating with your existing clients, you can work out how to convince potential clients that they need your products or services, and effectively put your sales plan into action.

Here are some things to consider when consulting and communicating with clients.

Client identification

Identify clients

By consulting and communicating with your existing clients, you can develop a more detailed picture of them and understand how to reach your target market.

This will also highlight key characteristics your existing clients share, such as:

- gender
- age
- occupation
- disposable income
- residential location
- recreational activities.

Understand organisational strategy

Strategic management is the process by which an organisation develops and implements plans that support its goals and objectives. The process of strategic management is a continuous one that changes as the organisational goals and objectives evolve.

Your sales goals and quotas must follow explicit and implicit organisational objectives and protocols to ensure that they adapt to trends and external changes affecting the organisation.

Here are some key concepts characterising the development process for organisational sales and marketing objectives.

Organisational strategy for establishing sales goals and quotas



Set objectives

Organisational goals, the mission statement, values and objectives guide the organisation in its pursuit of strategic opportunities. An organisation's sales and marketing objectives guide sales managers in meeting sales targets and higher revenue generation. Through goal setting, organisations plan how to compete in an increasingly competitive and global marketplace.



Analyse strengths and weaknesses

Analysis of an organisation's strengths and weaknesses is a key concept of strategic management. Through internal and external analysis, an organisation creates sales and marketing objectives that turn weaknesses into strengths. This allows the organisation to plan ways of adapting to changing technology and emerging markets.



Form a strategy

Strategy formation involves developing specific actions that enable an organisation to meet its sales and marketing objectives. Strategy formation uses the information from the internal and external analyses to prioritise and make decisions on how to address key issues facing the organisation. Strategy formation allows an organisation to find new ways of maximising profitability and maintaining a competitive advantage.



Implement the strategy

Strategy implementation involves putting the strategic plan into practice to meet organisational objectives. All the available and necessary resources required to activate the strategic plan are gathered. Organisations implement strategies through creating budgets, programs, policies, procedures and protocols to meet financial, management, human resources, sales, marketing and operational goals.

3C

Plan and document an individualised sales plan to achieve sales quotas within time frames

An individualised sales plan is a strategy that sets out sales goals, quotas and tactics for your business and identifies the steps you will take to meet your targets.

A sales plan sits within, or alongside, your prospecting and marketing plans to direct the efforts of your sales team. Most organisations develop or update sales plan periodically; for example, every 6 or 12 months.

Establishing an individualised sales plan helps you to:

- identify the market
- define a set of sales goals and quotas to achieve within clear time frames
- choose sales strategies that suit your target market
- identify sales tactics for your sales team
- activate, motivate and focus your sales team
- budget and clarify the steps you will take to achieve your targets
- review your goals periodically and improve your approach to sales.

Market analysis

You need to understand your market to ensure your sales plan focuses on current opportunities. Growing your business without understanding your competitors is risky. Market research prepares you for changing markets and prevents your business being left behind by the competition. Collect and analyse information about the market, your clients and competitors to avoid wasting time and money on failed sales opportunities.

A SWOT (strengths, weaknesses, opportunities, threats) analysis is a useful way to assess where you stand in your market in relation to your competitors.

Based on your market research, explain:

- why there is a demand for what you are selling
- your current market position, including any strengths, weaknesses, opportunities or threats
- your competitors' strengths, weaknesses, opportunities and threats
- emerging or forecasted trends in your chosen market.



Resources

List the resources required to help you meet your sales goal and quotas, including:

- budget – the finance allocated towards sales activities
- competences – selling skills of sales staff and areas in need of development
- other resource requirements – training, literature, mentoring or coaching
- briefing and communicating – how the sales plan is to be communicated
- monitoring – when and how sales activities and the sales plan are to be monitored
- feedback – other mechanisms to be used to assess sales progress.

Example: establish a sales plan

Marcus is a key account manager at Rolling Toys. The company manufactures and sells traditional and electronic toys and games, including dolls, hobby equipment and board games. Marcus is responsible for managing assigned accounts to drive sales and shipments of electronic toys manufactured by the company, specifically the 'Tracks and Wheels' merchandise. His major responsibilities include achieving the sales plan by planning and implementing sales to customers and fostering account relationships; monitoring marketplace activity and developing appropriate response strategies; analysing item trends to drive volume; and communicating with buyers in an effective and convincing manner.

Marcus is due to meet with his supervisor, Jacek, to present and discuss his individualised sales plan. Marcus prepares his plan in the following table.

Name: Marcus	Role: Key Account Manager, Rolling Toys
Market research	
Research plan: <ul style="list-style-type: none"> • Subscribe to Toy and Hobby Retailer magazine • Attend networking events and seminars hosted by the Australian Toy Association (ATA) • Purchase and read the latest 'Digital Australia' report commissioned by the Interactive Games & Entertainment Association • Obtain feedback from current clients using an electronic survey to identify client needs, preferences, budgets and concerns • Research competitors and their products • Identify any Rolling Toys products that are due to celebrate a milestone/anniversary and could be re-released under a special promotion or campaign 	
Research results: <p>Toy and game retailers have endured difficult trading conditions over the past five years. While solid demand for electronic and interactive toys has provided revenue opportunities for operators, trading conditions have been tough due to intense internal and external competition. As a result, revenue is expected to contract by an annualised 2.4% in the next five years.</p> <p>Revenue prospects have been affected by annual fluctuations in real household discretionary income, interest rates, consumer sentiment and the relative share of the total Australian population aged 14 years and younger. The geographical spread of businesses across the industry is largely influenced by the population distribution across each state, in particular the share of consumers aged 14 years or younger. Growth in residential developments in the area may increase the number of families with children moving into Rolling Toys' particular sales region.</p>	

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Topic 4

Complete sales paperwork and reports

After you have qualified a prospect to ensure they are serious about purchasing your product or service and are in a position to do so, you should prepare the documents they will need to complete the sale. Establishing a system to collect, record and organise sales data is essential to managing a productive and efficient business. When it comes to producing sales reports, your sales records are a wealth of information that can help you analyse, evaluate and present sales strategies and results effectively.

In this topic you will learn how to:

- 4A Establish a system to collect, record and organise sales data using available technology
- 4B Complete routine reports at regular intervals using available technology

Public cloud

A public cloud is where the services are stored off-site from the business and accessed over the internet. The storage is managed by an external organisation such as Google or Microsoft. This service offers the greatest level of flexibility and cost saving; however, it is more vulnerable than private clouds.

Hybrid cloud

A hybrid cloud model takes advantages of both public and private cloud services. By spreading your options across different cloud models, you gain the benefits of each model. For example, you could use a public cloud for your email to save on large storage costs, while keeping your highly sensitive data safe and secure behind your firewall in a private cloud.

Computer cloud advantages

There are many benefits to using cloud computing to record your organisation's sales data.

Here is an explanation of how cloud computing could benefit your business.

Reduced IT costs

Moving to cloud computing may reduce the cost of managing and maintaining your IT systems. Rather than purchasing expensive systems and equipment for your business, you can reduce your costs by using the resources of your cloud computing service provider. You may be able to reduce your operating costs because:

- the cost of system upgrades, new hardware and software are included in your contract
- you no longer need to pay wages for expert staff
- your energy consumption costs are reduced
- there are fewer time delays.

Scalability

Your business can scale up or scale down your operational and storage needs quickly to suit your situation, allowing flexibility as your needs change. Rather than purchasing and installing expensive upgrades yourself, your cloud computer service provider can handle this for you.

Business continuity planning

Protecting your data and systems is an important part of business continuity planning. Whether you experience a natural disaster, power failure or other crisis, having your data stored in the cloud ensures it is backed up and protected in a secure and safe location. Being able to access your data again quickly allows you to conduct business as usual, minimising any downtime and loss of productivity.

Legislative requirements

Collecting sales data is essential to tailoring your client service program and growing your business. However, there are legal requirements regarding what you can do with the information you have collected.

Here are the details of two legal requirements around sales data.

Privacy Act 1988 (Cth)	Corporations Act 2001 (Cth)
Privacy laws govern how organisations must record, store and dispose of data relating to the sales process. If you save contact and personal information from clients, you are required under the Privacy Act to make your clients aware of what you are collecting. You must clearly explain to your clients how you will use their information. All clients must have access to any information you have collected about them.	<p>Although all businesses should keep sales and other financial records to ensure they understand how their operations are faring, there are some types of companies that must keep these records for the purposes of preparing and lodging financial reports with ASIC.</p> <p>A company's annual or financial report usually includes sales revenue data. Financial reports prepared in accordance with the Corporations Act must comply with Australian Accounting Standards and International Financial Reporting Standards.</p> <p>Your organisation will have to lodge a financial report with ASIC if there are substantial sums of money involved; if the general public has invested funds with the company; or if the company exists for charitable purposes only and is not intended to make a profit.</p>

Example: establish a system for organising sales data

Gael runs her own business designing and creating one-of-a-kind wedding cakes. She gains most of her sales prospects via inquiries on her website and referrals through social media platforms such as Facebook and Instagram. Gael's wedding cakes retail for between \$500 and \$1,000 and generally cost about 20 per cent of the retail value for her to make. She generates a gross income of \$1,700 or more each week on a full-time basis.

Gael currently records her client details and sales data using a Microsoft Excel spreadsheet. Her spreadsheet includes column headings such as: date, client names, phone numbers, email addresses, product, quantity, unit price, total price and referral source. She uses Excel to extrapolate her sales data into a bar chart to identify her peak selling season and most popular wedding cake products. While her spreadsheet system is efficient and works for the small size of her business, she would like to use a holistic sales and client data management system that she can access from her smart device when away from home.

Gael begins using a business software package called CakeManager that has been specifically designed for home bakers to manage orders, schedule work activities and appointments, cost out recipes, price goods, create shopping lists, control inventory, log mileage and manage client information.

CakeManager also allows Gael to collect, record and organise her sales data by tracking marketing and social media activities, recording and comparing costs, revenue and profits, and managing her invoicing system. The best part is that she can log into the CakeManager cloud from her smart device to monitor her business activity from any location. This is saving her time and money.

Example: complete a routine sales report

Cynthia manages a sales team responsible for selling kitchen white goods, laundry white goods, hot-water systems, heating and air conditioning units, and small appliances, all manufactured by the company she works for. There has been a sharp decline in sales revenue over the last five years as industry manufacturers move their operations offshore.

Cynthia conducts an industry analysis and notices that the household appliance manufacturing industry has struggled to compete in a market increasingly dominated by imported goods. She decides to develop a quarterly sales report that can be used to forecast annual sales decline for her company. At the end of the first quarter for the year, Cynthia produces her sales report.



QUARTERLY SALES REPORT							
STATE: NSW				QUARTER: 1		YEAR: 2014-15	
Annual sales target: \$1,500,000							
Qtly sales target \$	Qtly sales achieved \$	Variance \$	YTD budgeted sales \$	YTD actual sales \$	Variance \$	Qtly sales achieved 2014-15 \$	YTD sales achieved 2014-15 \$
375,000	285,000	(90,000)	375,000	285,000	(90,000)	285,000	285,000
Summary of quarterly performance:							
Sales have declined due to increased competition from low-cost producers across Asia, combined with low domestic demand.							
Top 3 selling products:							
Product		Value	Key client				
Fridge		\$50,000	ICY COLD PTY LTD				
Washing machine		\$43,000	INASPIN LTD				
Dishwasher		\$28,000	WASHADISH INC				
Comments: top selling products have been consistent for the past five years.							
New clients: SEE BREEZE PTY LTD (air conditioning unit retailer)							
Comments: an unusually hot summer period increased demand for our air conditioning units.							
How did they hear about us: referral from ICY COLD PTY LTD							
Customers targeted this month: all							
Comments: sales activities have been focused on retaining our existing clients.							
Sales revenue forecast: sales revenue is likely to decrease by 24% for the 2014-15 financial year.							
Sales trends: the number of units sold has continued to decline.							

Practice task 11

Prepare some questions and conduct an interview with a sales manager. Identify how the manager completes routine sales reports at regular intervals according to organisational requirements. Identify how they use available technology to complete and produce their sales reports.

Workload management

Effective workload management, both individually and as part of a sales team, has a number of benefits for your job performance, your team members and aspects of your life beyond the workplace.

Here are some benefits of workload management.

Time	Working to agreed timescales If the whole sales team has a common understanding of timescales and focuses on the overall sales objectives of the organisation, then each team member is more likely to meet deadlines and achieve their sales goals and quotas.
Record keeping	Keeping up-to-date prospect and sales records Keeping your prospect and sales records up to date helps you to keep track and remember what you have done and what you still need to do. Updated sales plans and schedules are useful for sharing information and providing evidence of sales progress to managers, colleagues and business partners.
Communication	Communication with your team members Sales work involves a range of different team members, some of whom need you to complete a task or pass on information before they can start or complete theirs. By communicating with your team members and keeping them up to date on your work progress, they can factor the time required into their own schedules and you can access their skills and knowledge as you need them.
Performance	Individual job performance Making better use of your time can increase your capacity and productivity, which means that your organisation becomes more effective. If you are able to take on more sales prospects or clients, then this may result in more sales revenue or professional rewards. Effective workload management can improve your career prospects and help you achieve your maximum potential.
Personal life	Personal life Work affects our lives outside the workplace. Poor workload planning and management may mean that you have to work outside normal office hours to complete tasks or follow-up activities, cutting into your personal time. Feeling out of control may also cause you feelings of stress and anxiety. Planning and managing your workload effectively mean that you are able to be more flexible. This means you can plan holidays and time out of the office without disrupting your sales progress.

Informal planning tools

There are more informal ways you can plan your workload using lists and Word functions, although all planning tools demand organisation and methodical preparation.

Informal planning methods include:

- a weekly activity schedule
- to-do lists in a personal diary
- Microsoft Outlook calendar and task scheduling tools
- work schedules manually entered into spreadsheets and emailed to supervisors or team members
- template or forms available from your organisation's intranet
- minutes from team meetings.

Prioritise work tasks

When you have a range of competing work tasks to complete, you may find that you often try to complete more than one task at a time. This may result in all of the tasks being done to a lower standard than you would have achieved otherwise. You may also be confused about which tasks to do first.

Prioritising work tasks help you complete your work more effectively and efficiently, as you clearly allocate time for specific work tasks and also unanticipated events and activities.

You can prioritise work tasks according to a number of different measures, as shown below.

Urgency and task importance

Important or high-priority tasks are activities that help you to achieve your sales goals and quotas. A good way to prioritise key tasks is to use a task ranking system or complete a priority graph on a daily basis.

For example:

- 'A' tasks should be tackled immediately
- 'B' tasks should be planned and given action dates or time frames
- 'C' tasks should be done whenever you can do them, fitted around 'A' and 'B' tasks
- 'Z' tasks should be removed from your list of tasks or delegated to another team member

Task givers

In a sales work environment, you may find yourself working for a number of different people or departments, rather than just your direct supervisor. This is because sales tasks can relate to prospecting, marketing, sales, finance, public relations and client service.

The benefit of working in this way is that you can gain from the skills and experience of a wide range of colleagues. It means that your team members will be aware of your work, and if you develop a good reputation you may find that you are offered more responsibilities and career opportunities.

Productive and non-productive work activities

It is only when you properly understand how you use your time at work that you can minimise or eliminate non-productive activities. This means that you can do more high-value work, while still being able to leave the office at a reasonable hour.

You must be selective about how you use your work time to achieve meaningful outcomes. While an activity may be work-related, it may not be conducive to a productive work environment. Any work-related activities that are considered administrative or maintenance must be prioritised lower than activities that go towards achieving your sales goals and objectives.

Here is a list of productive and non-productive work activities.



Productive work-related activities

- Making follow-up phone calls
- Developing new prospecting methods
- Recording prospect information
- Completing sales paperwork
- Drafting a direct marketing email
- Undergoing sales skills training
- Attending networking events



Non-productive work activities

- Chatting with colleagues
- Checking and reading emails
- Organising your desk
- Browsing social media
- Organising a work social event
- Writing greeting cards
- Filing and archiving

Activity logs

An activity log, activity diary or job activity log is a written record of how you spend your time. You can use an activity log to analyse the time you spend on productive work-related activities.

Activity logs should not be confused with time sheets. While time sheets are used to report on your use of time and for tracking the time you spend on a task or job, activity logs help you build up an accurate picture of what you do during the day and how you invest your time.

You can create your own activity log template using a spreadsheet and selecting column headers that are relevant to your organisation and job role. Column headers may include date, time, activity description, how you feel (alert, flat, tired, stressed), duration, value (high, medium, low, none) or who allocated the activity.

Here are some advantages of using activity logs.