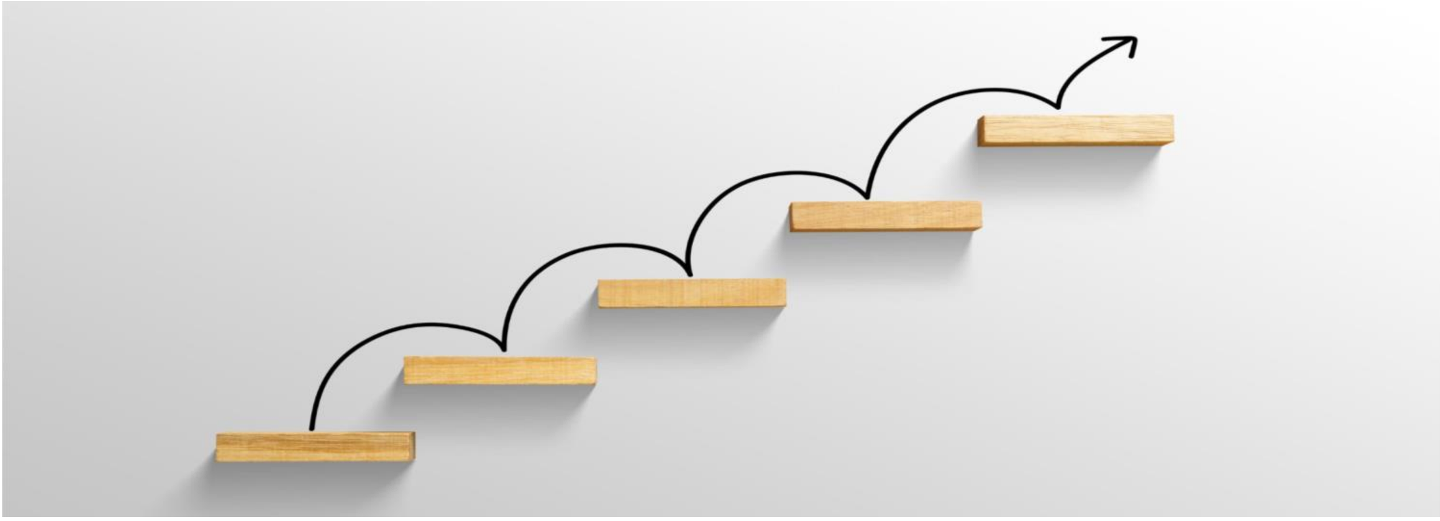

Do These 5 Things To Make Your Sales People's Performance Go Through The Roof

By Susan Saldibar

I know, because I used to do it myself. Back in the day, it was all about making call after call. The last thing you wanted was to find your reps putzing around in their CRMs. If they weren't on calls, they'd better be processing an order. And we dumbed down our CRMs as well. That allowed little more than a quick jump in and a quick jump out in a matter of seconds. The goal was to get to the next call.

That's ancient history by today's standards. Now we have tools to help us achieve a level of prospecting that we couldn't have imagined a few short years ago. And we have CRMs that can support those efforts. One person who gets this is Lynn Madderra, VP of Operations for Continuum CRM (a Senior Housing Forum partner).

The "call, call, call" mentality leads to other bad decisions.

I caught up with Lynn recently and asked her why so many sales playbooks still promote the old school "call, call, call" strategy. "There has long been a culture of 'make X calls per day' which, frankly, no longer makes sense," Lynn says. "It turns a potentially successful sales counselor into a machine, measured by quantity rather than quality." No kidding. And it also leads to a lot of other potentially bad decisions. Such as what kind of CRM you're using to support your sales and marketing team.

"From the CRM standpoint, the idea has always been to make everything 'simple and quick': 'I need to put my notes in within 30 seconds and move on to the next prospect'," says Lynn. But she warns that 'simple and quick' leaves a lot on the table in the form of actionable information for meaningful follow up.

So, here's how Lynn still sees way too many sales counselors handling prospect follow ups:

- Re-read everything I wrote last month.
- Try to remember the details of the transaction.
- Decide what action to take.
- Probably opt to keep my response generic to be on the safe side.
- Conduct my follow up.
- Quickly put my notes in again.
- Get on another call.
- Repeat …

When simple does not equal effective.

Which brings me back to my earlier point about the systematic dumbing down of our sales counselors. Sometimes the CRMs being used are serving to aid and abet a dumbed down approach to lead management. But, as Lynn is quick to note, “simple” does not equal “effective”, especially when it comes to choosing a CRM. “Simple and quick may be easy, but it’s shortchanging your community’s efforts to build and grow,” she says. “Dumbing down your sales counselors with a simple CRM solution will only result in hastily entered notes with no requirement for planning meaningful activity in the future,” she adds.

Instead, here is how Lynn says the process should go and how the CRM can support a more proactive and productive approach to moving a prospect through the funnel.

1. Enter your notes from today’s interaction.
2. Spend the time up front to think about where your prospect is in the buyer’s journey.
3. Plan a meaningful next activity or interaction.
4. Schedule that activity NOW with details on your calendar via the CRM.
5. Use your calendar to PROACTIVELY remind you to perform your next planned activity.

“As you complete your tasks or appointments Continuum CRM requires you to queue up the next task,” Lynn says. “So, every prospect always has an open and thoughtful activity scheduled. That way you are always planning your next move,” she adds. Does this take a bit more time? Lynn tells me that, in the long run, the answer is “No”. We are simply shifting our efforts to occur when they are most needed. Instead of wasting our time in a reactive state, we invest our time up front by planning and being proactive. It also leads to a much more a robust data set, with more authentic and personalized responses and (I would think) a shorter sales cycle for qualified leads.

Leadership needs to take the lead and eliminate “call, call, call” for good.

Assuming this makes sense to readers out there, I asked Lynn how senior living communities can move away from the “simple and quick” to more effective sales prospecting that they need to be competitive.

Not surprisingly it starts at the top. Leadership must have a stake in the CRM and lead by example, Lynn says. And well they should, since they’re the ones seeking intelligent information to make decisions. If you’re not asking your sales counselors to take the time to put that information into CRM, you can’t provide that intelligence.

Continuum’s mantra, Lynn tells me, is that the CRM needs to support a “culture of effectiveness”, which they define as planning, preparation and proactiveness. “We need to be able to plan our next interactions with the prospect thoughtfully,” she says. “We need to proactively be engaging with the prospect instead of waiting on their next move or just doing the same old ‘check-in’ call. That means the entire organization, from the top-down, needs to embrace a culture of quality over quantity.”

What do you think? Are you still dumbing down your sales counselors with “call, call, call” or empowering them with “quality over quantity”?

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