A Call Report System That Salespeople Won's Hate

A grizzled old veteran salesman once favored me with his wisdom on the subject of call reports. "Some of us hate filling these things out," he said, "and the rest of us don't."

"Don't hate them?" I asked

"No," he said. "We don't fill them out."

I'm pretty sure that an industry-wide survey of salespeople would come up with a similar dislike of call reports. And the truth is, it may be for good reason. For the most part, the call report systems I've seen are either poorly designed or poorly executed...or both!

Where's The Problem?

What's wrong with these systems? For the most part, the problems start with a fundamental misunderstanding of who the call report is really for. The perception of salespeople and sales managers alike is that the call report is something that the salesperson does for the manager. I say that's about 80% wrong!

It's only 80% wrong because there are a couple of important things that the call report does provide for the sales manager. One is the ability to measure action, the raw number of calls or contacts that a salesperson is making during a given amount of time. I'm a firm believer in setting *action standards* for every salesperson—so many cold calls, phone calls, appointments, and so on—and a call report is the ideal way to measure action standard performance. The other benefit only to the manager is the opportunity to deal with the report according to his or her own schedule. That becomes especially important as the number of people you're managing increases. There's a lot to be said for the ability to sit down on Saturday morning with a week's worth of call reports.

But that's only about 20% of the value of call reports. The other 80% is *to the salesperson* in a call report system that is designed and implemented properly.

A Two-Way Too

The key is to make the call report a two-way communications tool, and to minimize the requirement for any information that won't lead directly to some benefit for the salesperson. To state that second part simply, don't ask for information that won't help you manage or your salespeople sell.

What you're really asking people to do in call reporting is to think about what happened on each individual call. What was my goal on this call? What kind of reaction did I get? What specific things did the other person say that might indicate that I'm going to do business here, or that I might have problems here? What did I learn about the way I'm perceived? The way my company is perceived? About the market in general, or about my competitors? What do I have to do next with this prospect or customer?

The answers to those questions are primarily for the benefit of the salesperson, but do you see how they answer the sales manager's concerns too? Who is my salesperson talking to? What are these people saying? What are the problems that my salesperson is facing, and how do I help solve them? It's all part of what should be the overriding concern of a sales manager...how to help the salespeople to be successful.

I've had a great deal of success in my own sales management career in convincing my salespeople that the call report was really for their benefit. One of the keys to that success is that I read *and returned* every single call report within a few days of receiving it. I read them and returned them with my comments, and that's what made my call report system a two-way communications tool.

Sometimes my comments were problem-solving ideas. Sometimes they were "atta-boys" or "atta-girls". Sometimes I wrote "let's talk about this at our next face-to-face meeting", and I made myself a note to put the issue on the agenda. After even a short time with this system, my salespeople realized that this was really a very easy and convenient way to communicate. They spent some time writing, but not writing mickey-mouse stuff. My instructions, in fact, have always been to go into as much detail as you need to, but don't feel the need to write a book about a routine sales call. Overall, the call report system and the way I managed it saved them quite a lot of face-to-face time we may otherwise have had to spend to communicate the same information. And it helped them sell!

Your Own Boss

One final point before I wind this up. How about the situation where you are your own sales manager? Either the situation where you have outside salespeople and you sell too, or the situation where you as the owner are the only one who goes out to sell. Should you be filling out call reports? If you accept the fact that the call report is 80% for the salesperson, I think the answer is obvious. Yes!

I've had a number of versions of the reporting form itself. One version incorporates pre-call planning into the reporting process. The simple form has a planning section on the left, and a reporting and follow-up notes section on the right. As a two-part form, it provides a part for the salesperson to keep and one for the manager to read and return. As a one-part form, it would be perfect for the "self-managing" owner.

Camera-ready artwork for this form is one of the things I provide in the handouts for my *PRINTSELLING* seminar, but I'd be happy to send the artwork along to any reader. Send me a request with your business card and a dollar bill to cover the postage and handling, and I'll send the artwork right along. The address is PO Box 445, Cary, NC 27512.

NOTE: This Call Report form is now available at no charge on the "Downloads" page at www.davefellman.com.