

Sales Person Call Reports & Time Studies?

By Tom Junge, Iowa Field Director

In October of 1983, I started my first full-time job when I became a territory manager for White Farm Equipment. This marked the first time I completed a call report. Twenty-three years later, I'm still at it. With the exception of a few weeks here and there, I've completed call reports my entire working career.

Call Reports

Call reports remain a valuable tool for management to keep in touch with what happens in the trenches. During my White Farm Equipment days, my sales manager used the call reports to gauge the health of the ag economy, learn about competitive deals and keep informed about dealer issues. Often, he called me after reading my call report to discuss the issues and to help me deal with them.

At the Association, call reports are used to keep staff members aware of dealer issues, changes in dealership organizations, the well being of dealers, and dealer needs. These call reports often result in more in-depth discussions and actions based on the information.

At White Farm Equipment, these call reports were hand-written and done in chronological order. Today, I enter call reports electronically for each member, which then become part of their member record. These call reports are more than a communication tool to others – they have become a tool to help me schedule dealer calls and to remind me of previous discussions I've had with dealers. I can easily refer back to my calls to verify that I haven't missed calling on any members throughout a six-month period, as well as when I've made prospective member calls (cold calls). I can easily look back over a year of call reports and get a snap shot of the numbers of days I called on members, worked on shows, wrote articles, attended meetings, etc.

I'm always surprised that only a handful of members require their salespeople to submit a weekly call report. One member recently commented how valuable call reports are to him. He said they often refer back to the reports to refresh their memory about previous deals or farmer issues. He also said that it instills accountability to the salesperson's use of time. An industrial member mentioned that they always had their salespeople submit written call reports. Now, the call reports are entered electronically, so they can easily see who the salespeople are calling. They require their salespeople to call on new accounts and now they can easily generate a report to see if these new accounts are indeed being contacted.

For a dealership, call reports can provide a wealth of information, including how many customers the salespeople reach in a week, who they are seeing (old vs. new customers), what they quote, etc. It can also be considered a "whether" report:

- whether competition is vigorous
- whether the new product introduction is accepted
- whether a promotional effort is effective
- whether farmers are in a buying mood

- whether trouble is brewing in the economy
- whether there is a change in attitude regarding farming practices, etc.

Call reports are like the gauges of a high performance sports car. They tell you how the sales department engine is running and if problems are imminent. In today's competitive market, call reports must remain part of the salesperson's daily routine and more importantly, part of a customer profile. Salespeople will appreciate the ability to review important notes made from previous sales calls and sales managers will have insight into what's happening in the trenches in the war of equipment sales.

Time Studies

Another insightful tool that we use at the Association is time studies. Four times a year we record what we did for a week, broken down in 10-minute intervals. These studies were an eye opener for me since it showed how much time I spent on the road while calling on members. Some days I spent the same amount of time in the car as I had in dealerships. After performing the study, I began scheduling my routes differently and made sure there was a purpose behind the travel. I also discovered how much time is lost to non-productive tasks. At times, it was embarrassing to record what I accomplished for the day.

Since more dealers continue to review their sales department process, I think it would be interesting for a dealer to have their salespeople perform a weekly time study. It may prove enlightening and hopefully valuable to know how much time they spend planning sales calls, traveling, prospecting, cold calling, searching for inventory, appraising equipment, preparing proposals, writing retail and financing contracts, delivering equipment, setting up equipment, servicing accounts (customer problems and questions), attending sales meetings, etc. And let's not forget the most important task of face-to-face selling.

The ultimate goal of this exercise is to improve the sales process and to create more time for sales professionals to "sell."

NOTE: Before demanding that your salespeople complete the time study, explain that the purpose of the time study is to discover time-consuming tasks that are dragging their performance down. Be open and tell them that you don't know what to expect, because I doubt we really know what consumes all of their time. I confess that the first time I did the time study I was uneasy "letting others know how I spent my time." However, after the week, I had a whole different opinion of the study.