JOBZ! Printing Sales Software

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Account Challenge Procedure in JOBZ!

In accordance with our principles of free enterprise and healthy competition, I'm going to ask you two to fight to the death for it. -Monty Python

In most sales offices there are lots of potential customers buried on various lists who never get called on, or who are called on by the "wrong" sales reps, and therefore don't live up to their potential. You can be the "wrong" sales rep if you're too busy (saving the account for a rainy day) or if there is a personality conflict, or for a host of reasons.

Then there are the potential customers who aren't on any list at all, maybe because they once belonged to a rep who left the company before you started using JOBZ! Or they just started up and nobody even knows they exist.

How about the embarrassing moment that a sales rep gets the news from a prospect that they are already being called on by someone else from his office. "Don't you know that?"

And of course, every sales manager loves the task of visiting a customer who has the dubious pleasure of being fought over by two sales reps.

These are all problems that JOBZ! has evolved to handle over the years. Recent enhancements are aimed at making the process of distributing accounts even easier to administer, more professional, and more active.

There are a couple of ground rules: 1) Sales reps are responsible for all the people in the database with their name as the sales rep. This means that the information should be kept current, and be as accurate and complete as possible. 2) Before a rep calls on a prospect for the first time, they are required to see if that prospect is already being called upon by someone else from the company.

First, JOBZ! makes it easy to know who is calling on whom. With the networked version of JOBZ!, all your company's contacts are in one place, and it's easy for each rep to keep their own contacts current in the process of generating job correspondence or prospecting. A sales rep can easily check to see if a potential prospect is already being called on. (Click the "Shark List" button from the Address Menu and enter a company or contact name, then click FIND. A list of matching records will be shown that displays company or contact name, the assigned rep and the contact's primary categories.)

The manager can also publish a simple two-column report from JOBZ! that shows customer company names in one column, and assigned sales rep names in the other.

Since the manager can access the records of all the sales reps, to reassign a contact, he or she can simply change the name of the assigned sales rep. When the new rep logs in, they have all the contact's information. This works especially well when a rep leaves the company.

Second, to encourage the revival of dormant or underperforming accounts, there is the Challenge procedure. Here's how it works:

If a sales rep would like to take over a listed (protected) Account or Prospect, they ask the manager if they can challenge it. A form is provided for this that can be accessed from the Shark List screen, and is directed to the Sales Manager by email or hard copy. It prompts the rep for a reason they should be assigned this prospect or account, and to answer a series of questions about the company they would like to call on.

The same questions are the basis of what is called the Strategic Account Profile, accessed on the Company/Details tab of any contact's Input screen. It works like a checklist to help a rep research a company and develop a selling plan matched specifically to their needs.

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If the manager agrees that the challenge is appropriate, a click or two on the manager's screen records that fact and produces a Challenge Memo that puts the current rep on notice. After a specific interval, a decision will be made about reassigning this contact. The interval should be adequate to defend the account by showing progress, within JOBZ!, with actual quoting/selling activity, or at least prospecting activity (contact history.)

In addition to the Challenge Memo, sales reps can at any time click the "Show Challenges to You" button, and see if any of their contacts are challenged. Also, If a manager places a contact under challenge by another sales rep, the current rep will see a prominently displayed time-stamped alert on the contact's input screen.

The manager can also publish a summary of all the contacts under challenge.

There is a place for the manager to record the fact that a contact has been reassigned, and a memo that documents the action. The new rep now has access to this contact when they log in to JOBZ! There is also a report that neatly summarizes the reassignments, and a number of reports that present all this information sorted by sales rep, so it's easy to keep it all straight.

Of course, the manager is free to take the initiative on any challenging and reassignment activity. Tools are provided for reassigning blocks of contacts, such as everyone who works for a particular company, or any ad-hoc collection of contacts.

The Challenge process can open up untapped potential. It's easy to administer, and fair to all.

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