

Time and Territory Management

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Basic Concepts

There are several basic rules of being a good time manager:

- Learn to write things down, i.e., don't rely on your memory;
- Never repeat an activity, i.e., do things only once;
- Do two things at one time;
- Learn to say no, i.e., set priorities.

Your primary time objective as a manufacturers' representative should be to schedule your calls to secure maximum business. To accomplish this goal, you can take five specific action steps:

1. Determine how far you are from closing each account that is included in your plan for making quota.
2. Establish definite priorities regarding which prospects to call on and when;
3. Identify alternative calls you can make in the event of canceled or abbreviated calls.
4. Allow yourself enough time to accomplish your objectives on each call.
5. Put your call plan in writing.

The more careful your planning, the more efficient your itinerary will be. Think through what you must accomplish in a sales call and estimate how much time it will take. If you do so, you won't have to rush through a call or be late for the next appointment.

To meet your ultimate objective - the sale - you should define immediate objectives for each sales call. To determine exactly what you must or want to accomplish during a call, analyze the information available to you, e.g., what information you and the prospect will have to exchange; what the best solution is to fit the prospect's needs as you see them.

General Time Planning Suggestions

More efficient, more productive time and territory management will not and cannot be achieved without concerted, consistent effort. Following is a collection of ideas for becoming a better time and territory manager that have been used by manufacturers' representative salespeople and other sales personnel throughout the nation in a wide variety of industries.

- Before you leave home or your office, know exactly where you are going and why.
- Do your planning and paperwork before and after the prime selling hours of the day and on weekends. Save the prime hours for face-to-face customer contacts and important telephone calls.
- Schedule your time ... monthly, weekly and daily. Invest in a good calendar and time management system that will work for you and improve your effectiveness.
- Determine the best time to interview certain buyers. Schedule calls and appointments for these times and then build your other calls around these priorities.
- Your primary objective should be to increase your selling time. Don't fall into traps or bad habits about when you can and cannot call on buyers. Your challenge is to extend your selling day by finding times to call on your prospects. Know when your customers are available to see you.

- Fill in your schedule with warm prospecting calls. However, prioritize your call activity. Always ask yourself, "What is the best use of my time right now?"
- Keep office routines to a minimum. Don't let them keep you from making that first early morning call each day.
- Screen prospects. Call on those who are most likely to become steady, repeat customers.
- Base frequency of calls on potential rather than convenience. Give more attention to your accounts with higher profit and higher sales potential.
- Keep in regular contact with your office to get word of changes or developments that might affect your schedule, save a wasted trip, etc.
- Firm up the next day's schedule as you go along (confirming arrangements, new appointments etc.).
- If waiting is inevitable, catch up on your planning, record keeping and reading of product literature.
- Be flexible enough to absorb changes and cancellations. Be ready with substitutions or back-ups.
- Study each day's performance. Where could it be improved? Take steps to make those improvements.

Travel Time

- Reduce your travel time by routing your daily calls to minimize (or avoid) backtracking and crisscrossing and to insure that no high priority calls will be left outstanding at the end of the day.
- Plan each day's calls to concentrate your effort in areas that take a minimum of travel time.
- If needed, use a map to lay out your accounts and your call schedule. Construct a good route plan that takes into account congested traffic in certain areas at certain times of day. You'll find that the most efficient route plans are based on a straight line, circle, concentric circles, or a cloverleaf.
- Plan your travel, meals, breaks and telephone calls when your customers are not available to see you.

Personal Time

- Watch the coffee breaks, the long meal times, the slow starts in the morning, and the early quits in the afternoon.
- Avoid the impulse to goof off after a good sale or good interview, or after a string of unprofitable ones.
- Don't succumb to bad weather blues. Keep making calls.
- Don't put it off. The job, project or telephone call that is put off for no good reason seldom gets better or even done at all.

WEEKLY REMINDER

___ / ___ / ___ thru ___ / ___ / ___

MONDAY

1 () _____

2 () _____

3 () _____

TUESDAY

1 () _____

2 () _____

3 () _____

WEDNESDAY

1 () _____

2 () _____

3 () _____

THURSDAY

1 () _____

2 () _____

3 () _____

FRIDAY

1 () _____

2 () _____

3 () _____

SATURDAY

1 () _____

2 () _____

3 () _____

SUNDAY

1 () _____

2 () _____

3 () _____

CALL ORGANIZER

CUSTOMER _____ DATE _____

Objectives	Results

SALES CALL REPORT		Date _____
Sales Call _____		Branch/Region/Zone _____
Address _____		Reporting Period: From _____ to _____
City _____		Date Submitted _____
State / ZIP _____		Report No. _____
Product Line _____		Page _____ of _____
Territory No _____		
SUMMARY		
<p style="text-align: center;">Sales Call Via</p> <p>() Phone () In Person () Other _____</p> <p>_____</p> <p>_____</p>	<p style="text-align: center;">Sales Call Was</p> <p>() Cold Call () Lead from _____</p> <p>() Follow-up from call made on _____</p> <p>() Other _____</p>	
<p style="text-align: center;">Mailing List Action</p> <p>() Add to mailing list.</p> <p>() Drop from mailing list.</p> <p>() Send literature _____</p> <p>_____</p> <p>() Other _____</p> <p>_____</p>	<p style="text-align: center;">Mailing List Addition/Drop</p> <p>Name _____</p> <p>Title _____</p> <p>Company _____</p> <p>Address _____</p> <p>City _____</p> <p>State/ZIP _____</p>	
<p style="text-align: center;">Firm Is</p> <p>() Regular customer.</p> <p>() Previous customer.</p> <p>() Inactive customer.</p> <p>() Unhappy customer.</p> <p>() Other _____</p> <p>_____</p>	<p style="text-align: center;">Firm Is</p> <p>() Excellent prospect for _____</p> <p>_____</p> <p>() Potential prospect for _____</p> <p>_____</p> <p>() Not a prospect.</p> <p>() Other _____</p>	

Contacts within company:	Rank
_____ _____ _____ Title _____ Phone	_____ _____ _____
_____ _____ Title _____ Phone	
_____ _____ Title _____ Phone	
Signature _____ Follow-up Date _____	

MONTHLY SALES PROJECTIONS

Salesperson or Department _____ Date _____

	NEW BUSINESS			REORDERS			TOTAL.		
	Goal	Actual	Var.	Goal	Actual	Var.	Goal	Actual	Var.
JANUARY									
FEBRUARY									
MARCH									
APRIL									
MAY									
JUNE									
JULY									
AUGUST									
SEPTEMBER									
OCTOBER									
NOVEMBER									
DECEMBER									

YEAR

COMMENTS

SALESPERSON'S ANALYSIS		Date _____
Salesperson _____		Territory _____
	FORECAST	ACTUAL
SALES & PROFIT		
Gross Sales		
Gross Profit		
% Gross Profit to Gross Sales		
Net Profit		
% Net Profit to Gross Sales		
SELLING COST		
Salary		
Commission		
Expense: Auto		
Travel		
Telephone		
Entertainment		
Other		
ACTIVITY		
Total Days Worked		
Number of Calls Made		
Avg. No. of Calls per Day		
ACCOUNT INFORMATION		
No. of New Accounts		
No. of Accounts Lost		
No. of Accounts at Qtr. End		
No. of Potential Accounts		

TERRITORY POTENTIAL SHEET

Territory _____ Date _____

		PRESENT	FORECAST
C U S T O M E R S	TOTAL MARKET		
	COMPANY SALES		
	SHARE		
P R O S P E C T S	TOTAL MARKET		
	COMPANY SALES		
	SHARE		
O T H E R	TOTAL MARKET		
	COMPANY SALES		
	SHARE		

COMMENTS

Sales Time Management Worksheet
Hours Spent During Prime Selling Time

Weekly

ACTIVITY	ESTIMATE	ACTUAL	VARIANCE
Travel			
Waiting			
Telephoning			
Client Relations			
Complaints			
Prospecting and Pre-Approach			
Talking with People Other than Buyer			
Meeting with Manager			
Planning and Study			
Entertainment			
Reports and Paperwork			
Meetings			
Other (List)			
TOTALS			

Daily Objectives / Things to Do

Date: _____

THINGS TO DO	TELEPHONE CALLS	APPOINTMENTS
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

NOTES

EXPENSES

Mileage (Start) _____
Mileage Driven _____
Auto Expenses:
Gas \$ _____
Parking _____
Business Expenses:

Telephone: _____

Time Analysis

TOTAL WORKING HOURS:

Working days per year (5-day week)		5 x 52 = 261 days
Less: Vacation	(_____ days)	
Holidays	(_____ days)	
Total	(_____ days)	subtracted from 261 = _____ days (A)
Sales Meetings	(_____ days)	Your company and principals
Personal days off	(_____ days)	For illness, industry social events, personal business, workshops, etc.
Travel days	(_____ days)	For trade shows, conventions, sales meetings, etc.
Trade shows	(_____ days)	
Total:	(_____ days)	subtracted from (A) = _____ days (B)

Working hours per day -- Consider 11 hours available - 6:30 a.m.-7:30 p.m.

Multiply **(B)** x 11 = _____ **TOTAL HOURS AVAILABLE PER YEAR (C).**

Daily time usage:	Hours
Planning	_____
Personal time	_____
Administrative	_____
Lunch, coffee	_____
Telephone	_____
Other	_____
Total	_____ Hours per day x (B) = _____ Hours per year

Travel time:

Average business miles driven per year _____ at _____ MPH = _____ Hours per year
(including parking time, walking, freeway and city driving)

TOTAL NON-SELLING TIME (D): _____ **Hours per year (D)**

TOTAL AVAILABLE HOURS PER YEAR (C) _____ minus

TOTAL NON-SELLING TIME (D) _____

TOTAL AVAILABLE SELLING HOURS _____ Hours per yr. divided by 12
_____ Hours per month

Account Analysis (1)

The ACCOUNT ANALYSIS (1) below is a simple way of looking at an individual account within a territory and comparing its actual volume to planned volume and real potential. This can best be done on a simple computer program for the entire company. However, a salesperson can do it manually on a regular basis.

Account Analysis (1)

How is my sales volume obtained? Repeat accounts or new accounts?

	Number	Percent	Volume	Percent
Repeat Accounts	_____	_____	_____	_____
New Accounts	_____	_____	_____	_____
Service Accounts	_____	_____	_____	_____
Totals	_____	_____	_____	_____

If any portion of your business is from REPEAT ACCOUNTS, list them by DOLLAR VOLUME (starting with the highest, using either year-to-date or your "budgeted" figure. Do not consider **potential** at this time. NOTE: Your figures for "Volume" and "Potential Volume" should cover the same time period.

Rank	Account	Volume	Potential Volume	Performance Percentage	Potential	Class
1	_____	_____	_____	_____	_____	_____
2	_____	_____	_____	_____	_____	_____
3	_____	_____	_____	_____	_____	_____
4	_____	_____	_____	_____	_____	_____
5	_____	_____	_____	_____	_____	_____
6	_____	_____	_____	_____	_____	_____
7	_____	_____	_____	_____	_____	_____
8	_____	_____	_____	_____	_____	_____
9	_____	_____	_____	_____	_____	_____
10	_____	_____	_____	_____	_____	_____
11	_____	_____	_____	_____	_____	_____
12	_____	_____	_____	_____	_____	_____
13	_____	_____	_____	_____	_____	_____
14	_____	_____	_____	_____	_____	_____
15	_____	_____	_____	_____	_____	_____
16	_____	_____	_____	_____	_____	_____
17	_____	_____	_____	_____	_____	_____
18	_____	_____	_____	_____	_____	_____
19	_____	_____	_____	_____	_____	_____
20	_____	_____	_____	_____	_____	_____

Account Analysis (2)

The ACCOUNT ANALYSIS (2) form below is for territory analysis to determine how many hours the accounts in the territory require on a monthly basis.

Key, important and regular accounts probably require one or more calls per month. Minor accounts generally require less than one call per month. For prospecting, assume one prospecting call per day and that it consumes one hour.

From this analysis, conducted during many sales seminars for manufacturers' representatives, it's been determined that most salespeople feel they need more hours to cover the accounts and prospects than the TIME ANALYSIS (1) showed that they had available. Salespeople say that two things happen as a result: first, there is less prospecting; second, the quality time with key and important accounts is reduced.

Account Analysis (2)

Account Class	Call Freq. Code *	No. of Accts.	Total Calls Per Month (**)	Total Hours Per Month (***)
Key Accounts	_____	_____	_____	_____
Important Accounts	_____	_____	_____	_____
Regular Accounts	_____	_____	_____	_____
Minor Accounts	_____	_____	_____	_____
Minor Accounts	_____	_____	_____	_____
Prospecting	_____	_____	_____	_____
Total hours per month required for account coverage				_____
Total hours available from Time Analysis (1)				_____
Difference (required hours minus available hours)				_____

* For accounts with less than one call per month, use a fraction in this column, i.e., 1/2 = every two months, 1/3 = every three months, etc.

** Round off to the nearest whole number.

*** Start counting from the time you enter the door until you leave the building. Do not count traveling, parking and walking to the building.