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Get Organised! by Bob Hazell

It's quite possible that there more sales are lost through poor organisational skills than through poor presentation skills.

How does your business operate? If the salesperson dies or leaves, how much information goes with them? How much is committed to a system that a new person can pick up and run with? How long would it take to get back the business we lose in the interim?

Personal Organisation

With all the tools available to us these days there is little excuse for forgetting to ring someone or forgetting to do something. Tools like Microsoft Outlook and Lotus Notes can be used to not only schedule meetings and call backs, but to give us reminders as well.

One of the greatest tips in time management is to 'forget remembering.' Committing things to a system, whether paper or electronic, is the best way of keeping on top of the job. The things to watch out for now are:

- Don't lose the system.
- Make sure electronic files are backed up.

Keeping Control

As Outlook is the commonest electronic system, here are some tips on keeping up with our clients by using it.

The first thing we need is a 'Customer Record Card', and this is easily done using the Contacts folder. Open the folder and double click anywhere on the white space to open a new record. We type in all the data we need to create the contact. We are able to link files we create in Word and Excel etc to the contact using the 'Actions/Link' command. When we then open the 'Activities' tab Outlook will find all the linked files for us. If we prefer we can insert a shortcut using the 'Insert' menu.

Now we can create a Task for the contact using the 'Actions/New Task for Contact' command. Give the task a name, e.g. 'Nuria, XYZ re new project'. Adding the phone number here is helpful since it saves clicking on the contact at the bottom LHS to bring up the contact details. Use 'today' as the start date and set the date you need to contact as the due date. On the main **Tools** menu, click **Options**, click the **Other** tab, and then click **Advanced Options**. Click **Advanced Tasks**. To have a reminder automatically turned on for new tasks, select the **Set reminders on tasks with due dates** check box. We recommend this to make sure reminders are set.

Now for the key point:

The most important thing to do is to keep a record of every conversation, action and visit attached to the task. Do this in the large space underneath. To do this, click in the space, select the **Format font** command on the task and set it to Arial 8 point. This seems to work just right because the date can now be entered on the left and we can tab across to put the result.

Each time we speak with the customer we now agree the date to ring back, and when we re-enter we can begin (after intro's) with "Last time we spoke was" or something similar. It's easy to keep in contact when we have agreement from the customer that we can do it. There's a lot more to it than this, but we wish you success in getting organised. You'll be surprised at the difference it will make.

We've got loads of other top tips like this one.

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