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Keeping good call records a necessity, not a useless chore

Denver Business Journal - by [Garry Duncan](#)

When you ask salespeople what they dislike most, paperwork and call records are high on the list of complaints. Many see record keeping as unnecessary, tedious, time-consuming and nonproductive.

However, call records can be one of the best and most valuable tools you have. Good records can facilitate the close of new business, increase repeat business and help jump-start the launch of new products. More returned calls and increased trust are added benefits.

A major reason call records aren't valued is because the information entered is of little use in helping close the deal or move it forward.

For example, you can lose rapport and trust with some buyers simply by asking the same question twice. A repeated question conveys you aren't listening, have a poor memory or that the buyer's business isn't that important.

One auditory buyer took great exception to hearing the same question she had answered during the first meeting. The salesperson never recovered and eventually lost the deal. You can avoid that experience by keeping your records up to date.

The best time to make notes and determine objectives for the next call is when the call is fresh in your mind. We think we can remember, but details slip away. Test yourself: What were the key questions (and answers) you received on your last sales call? The dullest pencil is often better than the sharpest memory.

So what is important to keep? These categories will get you on track.

- Demographics and personal information are, of course, essential.

One example of information to record is the "McKay 66," put together by Harvey McKay, author of "Swim with the Sharks." McKay asks his representatives to fill out a 66-question customer profile covering customer information, education, business background, special interests, lifestyle and vendor-relationship questions. It's available on his Web site, www.mackay.com.

This attention to detail will facilitate your ability to speak confidently and differentiate you

from your competition.

- Prospecting is the lifeblood of success in sales, and the best road to new business is referrals and introductions.

Current contacts are often the best conduit to others in the same industry. Note where your contacts have worked and in what associations they're active. This way, you can prioritize them as potential referral sources. Current clients usually know others in their industry, and asking for a specific referral is better than making a broad request for referral names.

- Focus your call records on where you are in the sales cycle and the problem the client is trying to address.

When you get in the habit of noting where you are in the sales process, you eliminate one of the biggest stalls and sale-stoppers. When you hear "I need to talk to my partner," or "I need to present this to my committee," you know that you forgot to qualify the decision-making process.

Good notes will serve as a reminder to qualify completely. Referencing the client's problem on follow-up calls will help re-prioritize and re-generate need, stimulate emotion and re-focus their attention on you and your product.

Referencing the reasons for their need instead of product information also will facilitate a higher number of returned calls when you leave a phone message.

- Don't forget to note questions you need to ask, expected objections and tasks to complete before the next call.

Relying on memory alone increases errors. Physicians are good role models; they make notes and record our answers during the time they see us or immediately thereafter. It's too important to risk an error or forget something important.

- Finally, the time to determine the objective and tactics for the next call is immediately after the present call. Because your memory is fresh, you have the best chance of accurately assessing needed next steps. It also will take less time now than trying to reconstruct a plan (with potential errors) in a month.

To keep the right perspective on recording call details, remember that it can be a war out there, and the more battle intelligence you obtain and retain, the better off you are. Everyone is competing for credibility, market share, business contacts and sales figures.

Win more sales with accurate information and increase your ability to integrate into your clients' environment. Investing two minutes per call keeping precise notes may be all you need to outwit your competition.

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