CHAPTER 1: THE SALES ACTIVITY MANAGER

SAM and Your Sales Organisation

One of the key aspects underlying successful sales is organisation: the ability to classify and access information quickly and accurately. All too often, actual selling time is sacrificed to paperwork; looking for information, compiling statistics, generating and studying reports. And, all too often, potential sales are lost because of the time lag between the first contact with the lead and the next call or appointment.

The Sales Activity Manager is a comprehensive lead and sales management system that offers the sales professional a totally integrated, one-stop sales and lead tracking solution. Contrary to non-computerised systems, where leads can be lost or are not followed up as quickly as they should be, leads entered into SAM cannot get lost and will not escape the sales professional's attention and be allowed to age. Once a lead has been entered, it remains in the system until it is declared unsold. The status of all outstanding leads is always apparent and instantly accessible.

Numerous easy-to-use techniques are available for immediately locating the precise information that the user requires. For example, you can look at all currently unsold or undetermined leads, or find one particular lead based on a name or phone number.

External communications with salespeople, personal referrals, and customers is made easier through the use of reports, form letters, and labels. Salespeople can be advised of their performance through a detailed report; customers can be sent letters of appreciation and questionnaires, or be advised of new products, service and warranty policy changes; people who have referred new customers can be sent promotional gratuities or an acknowledgement. SAM's leads do not remain static entries, but become part of a dynamic link between the sales department and the people it communicates with.

Because SAM is a complete information tracking and reporting system, the user can access a virtually limitless variety of vital sales statistics. The user chooses the criteria that define the statistical data: for example, he or she can look at the reasons why a particular product or set of products are not selling in a particular territory, at which salesperson has the highest sales for a particular time period, or at how many leads were generated by an advertising campaign. With SAM, guesswork disappears; sound decisions can be made on the basis of accurate, thorough, and up-to-date information.

An Overview of SAM

SAM consists of five main modules, each of which performs a distinct task or set of related activities. Within each module, a subsystem or set of functions further breaks down module activities. The diagram below illustrates SAM's main activities:

DIAGRAM of SAM MODULES and ACTIVITIES

Using the Modules

In this section, each module and its purpose is briefly described. Detailed procedures for using each module are given in the corresponding chapter of the manual.

The Add Leads Module

SAM's ADD LEADS module lets you enter pertinent data on prospective customers quickly and easily. Fast data entry -- especially important when talking on the phone with potential clients -- is achieved through automatic capitalisation, pop-up lists, and automatic formatting of such data as names and postal codes. Comprehensive information about prospective customers can be entered in a matter of seconds. Once lead information has been entered in this module, it becomes available to all other modules.

The VIEW/EDIT LEADS Module

The VIEW/EDIT LEADS module is the cornerstone of SAM. In this module, leads can be edited and updated, appointment, callback, sales, delivery or ship dates can be entered, as well as sale and deposit amounts. Lead records appear in a table view, with each lead record on a separate line. Switching to a full screen edit view, in which all information about a single lead occupies the entire screen, is accomplished with a single keystroke. You can then edit or update all or selected fields in the current lead record. Returning to the table view is again done with a single keystroke.

Within the editing module, a callback and appointment management subsystem organises undetermined leads into three categories for daily tracking activities. A single screen contains a bird's eye view of all unsold leads and their current status. In this submodule, you can view and update scheduled appointments and callbacks; SAM moves updated leads into the appropriate category. Printed reports are available that provide either a detailed report or an overview.

User-defined filters can be applied to the lead database, allowing you to view only those leads that comply with the filter conditions. You define the filter conditions by selecting from lists of categories: for example, to view only leads that live in Toronto, you would select Toronto from the city list. Filtering can also be invoked in the FORM LETTER and STATISTICS modules.

The STATISTICS Module

SAM also features a powerful statistics module. The user selects the type of data to analyse: sales- or lead-based, advertising costs, reasons for non-sales, or callback information. Once a category is selected, the user chooses from a list of qualifiers, and then builds a filter condition to yield the precise statistics needed. SAM quickly present easily readable data, which can then be sorted by column or printed.

The FORM LETTERS Module

SAM has a built-in mini word processor where letters and bulletins can be entered and sent to customers and the people that have referred them to your company. As the text is being input, merge codes corresponding to database fields are entered into the test through familiar pop-up lists and menus. When the letters are printed, personalised information is merged into each letter. Corresponding mailing labels can also be printed for all the outgoing letters.

The MAINTENANCE Module

The maintenance module contains a variety of small utility programs that you use to set security passwords, maintain advertising cost information, create and maintain pop-up lists, perform backup functions, and set the range of the main database.

Advertising costs can be entered for each advertiser, each issue, or each run of advertising. This information, along with the date of purchase and estimated response time, is used in the STATISTICS module to evaluate the performance of advertising purchases.

Pop-up lists are used throughout SAM for quick and easy data entry. While list items can be entered for the current work session or current entry, you can maintain all lists in the MAINTENANCE module.

Backing up data is an essential part of responsible computing. All SAM files and databases can be backed up to floppy disks. If the host computer's data storage device fails, SAM's data can be restored to the new storage device.

You set the default size of the leads database in the MAINTENANCE module by selecting the number of months that pending leads are to remain current.

Using SAM

This section briefly describes how to enter and exit SAM, and how to access the main modules.

Entering SAM

To enter SAM, check with your system administrator to discover the proper method for your system. You may require a password, which the system administrator assigns, to be able to gain access to SAM.

Using SAM's Main Menu

When you enter SAM, the SAM Main Menu, shown below, appears on your screen:

SAM Main Menu

You access a module by using the up and down arrow keys to highlight the name of the module on the menu. In the example above, the ADD LEADS module is highlighted. Note that the information bar at the bottom of the screen briefly describes the function performed by the highlighted module. When you have highlighted a module name, press the Enter key to access the module.

Using the Tutorial

If you are learning how to use SAM and you do not want to affect any existing information, you can use SAM's tutorial mode. To do so, press the ALT key and the T key simultaneously from the SAM Main Menu. You can now perform any function or activity in SAM, but you access the tutorial database instead of your company's data. When you are in tutorial mode, the word "TUTORIAL" will flash in the top right corner of the screen.

To return to the company database without exiting from SAM, return to the main menu and press the ALT key and the T key simultaneously again.

Using Online Help

You can access online help from any screen within SAM. The available types of online help are described below:

Context Sensitive Help: If you require an explanation of a particular field, highlight the field and press F1(Help). A brief description of the field and the action you should take is displayed on the screen.

Function Keys: If you require an explanation of the function keys available for a particular module or screen, press the Shift key and the F1(Help) key simultaneously. A description of the function keys that you can use on that screen is displayed.

Exiting from a Module

To exit from a module, press the ESCape key. You will return to the previous menu. If the previous menu is not the SAM Main Menu, you can either select the EXIT option from the menu OR continue to press the ESCape key until you reach the SAM Main Menu.

Exiting from SAM

To exit from SAM, return to the SAM Main Menu. Select the EXIT option by highlighting EXIT and then pressing the Enter key.