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Working the system—successful project management

The life of a sales manager is a progression of one project after another. We do lawn and garden tabs and special holiday sections. Sometimes we are challenged to launch a new product or to expand an existing publication into a new area. Just marshalling our sales people and our resources to achieve a quarterly budget can be managed as a project. To ensure success, these projects must be properly planned and organized. To be effective, a sales manager must possess strong project management skills. While this article is written from the perspective of a sales manager, the ideas expressed are just as applicable to the activities of individual sales people.

Project management is about seeing the forest without losing sight of the trees. Good project managers are “systems thinkers.” Systems thinkers see the “big picture.” They think about where each individual part of a project fits into the whole and how it impacts every other part. They think about the sequence in which things must be done and what resources are needed to accomplish their goals. Good project managers have a clear picture of what they want to accomplish and where they stand relative to their predetermined goals. They use this information to proactively adjust their planning when their project goes off track. A good project manager’s real time situational awareness means that they can correct problems long before deadline, while there is still time to do so.

Stage 1—Planning the project

Like so many things in business (and in life in general), the best way to get started is to ask the right questions. You want to ask yourself the basic: who, what, where, when, why and how questions, though not necessarily in that order.

- What is the purpose of the project? What do I want to accomplish?
What will success look like?
- Who will this project help? Who are my potential customers?
Who will read this section? Who can I get to sell this project?
- Where will we find the customers and readers for the section? Where should we distribute the project and how many copies will we need?
- When should we deliver the section to the readers? When should we begin the canvass so that we have enough time to sell the advertising?
- Why would an advertiser want to advertise in this section?
Why would a reader want to read it? Why is it different from our other products or from the competition?
- How much will this project cost? How much do we need to sell to make a profit and will the market produce the necessary revenue?

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If you can provide a realistic answer to each of these questions you have the information you need to proceed to stage 2.

Stage 2—Preparation

In the preparation stage, the objective is to put the planning and thinking from stage 1 into tangible form. The project manager needs to create the sales materials and prepare the sales team to sell the project and communicate its value.

- Work with your artists to develop a mock-up of the finished product. The mock-up should be as close to the finished product as possible. If your project has been done before locate previous copies to show customers.
- Design and print up collateral materials. These should include pricing, coverage and deadline information, as well as key selling points.
- Prepare information packages for the sales force. These should include sales collateral material; a list of the project's features, advantages and benefits, detailed order procedures, project-tracking forms and suggested sales scripts and answers to expected objections.
- Set up a project timeline.
- Plan sales training for your team.
- Determine individual and team goals for the sales people.

Stage 3—Launching the project

Getting your project off to a good start is essential. A good launch arms your team with everything they need to be successful. They should walk away with all the information they need to answer customer questions and clear understanding of their goals. A good launch also makes the reps comfortable presenting the product and confident in their ability to sell it. In the launch phase, the reps should provide the project manager with a tactical plan detailing whom they intend to approach.

- Reps should be presented with individual project packages containing sales collateral materials, tracking forms and their personal sales goals.
- Present the project detailing features, advantages of the project.
- Conduct training by demonstrating sales approaches. Engage the reps in role-play and objection response exercises to make them comfortable with presenting the project.
- Have the reps prepare a list of potential customers for the project within their territories. They should also prepare a list of the ten highest potential or “key” prospects.
- If the funds are available finish the launch by announcing a sales incentive to reward the top sellers on the project.

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Stage 4—Managing the project

Hal Geneen, CEO of ITT was famous for keeping a plaque reading “NO SURPRISES” on his desk. He understood that as a manager he was responsible for keeping his finger on the pulse of his organization. It is absolutely essential to carefully track your progress toward the project goal and hold the reps accountable for achieving their individual objectives. Failure to take control of these factors leaves the success or failure of your project to chance. Tracking your progress throughout the sales cycle allows you to make “mid-course corrections” long before you approach the deadline. When your reps know you are paying close attention to their sales they are unlikely to put a critical project “on the back burner.” Requiring reps to be accountable sends a clear signal that “failure is not an option!”

- Assign one person to track all sales for the group. The reps should notify this person each time they close a sale. The “control” person should enter the account name, the ad size and the revenue into a spreadsheet showing total sales and the progress toward the goal. This should be shared with the reps on a regular basis.
- The manager should speak with each of the reps on a regular basis to review their contact and key account lists. The manager should inquire about the appointments set by the rep and the status of all pending sales.
- Meetings with the team should be set at the 25%, 50% and 75% of the project timeline. At each meeting the reps should report out to the group. They should report on their sales to date, the number of accounts they have contacted, pending sales and an estimate of their total sales. The manager should use these occasions to praise the sales leaders and refocus the team.
- An additional meeting should be set one week prior to the final close of the project to tie up loose ends and identify any challenges the manager should address.
- Reps who are under performing should be offered one-on-one training and the manager should work with them in the field to refine their sales approach.
- Accounts that reps have not closed should be reassigned to the project sales leaders who will be responsible for making another attempt to sell them.



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Stage 5—Post project review

Each project we complete offers lessons that can be applied to the future. This should also be used as an opportunity to train the reps and prepare them for the next project.

Schedule a final meeting on the project. The reps should report out on their sales results and where they finished relative to their goal. They should also detail the lessons they took away from the project and what they will do differently on the next project.

The manager should review the group's performance and recognize the sales leaders in front of their peers. Any sales incentives should be paid at this point.

The manager should meet individually with the reps that finished below target. The manager should take appropriate action to correct the situation offering the rep additional training or placing the rep on a corrective program.

The manager should review his/her own performance and determine what he/she will do differently on future projects.

Conclusion

Humorist Kin Hubbard once said, "Lots of folks confuse bad management with destiny." Good project management is about taking control of our destinies. Project management requires focus, discipline, and the willingness to hold others accountable for their actions. Effective project managers understand that to achieve big things, they must pay attention to the little things, that a successful campaign is won one sale at a time. Project management is a lot of work but the rewards are great. Good management improves the chance of achieving your goals exponentially. Research has found that the more control a person has over their life, the happier they are. Systematic management is the best way to take control of your projects and your happiness.

This article was written by Jim Busch of the Pittsburgh Pennysaver.

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