Selling Guide

Schedule Future Customer Follow Up Activities

How to Schedule Customer Contacts With Assigned Activity Dates

January 2011

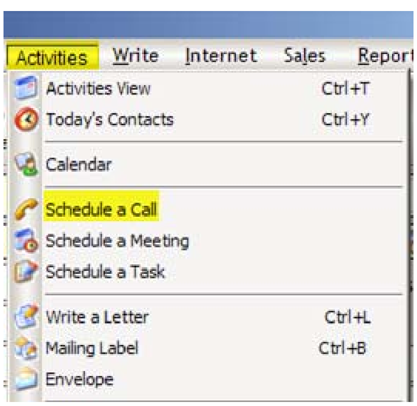
"Timing Is Everything"

Closing a sale is all about timing. Your timing to close a sale can be managed by the day by each customer with the Customer Frontline™ "Activities" scheduler. Activity assignments can build a sequential follow up plan based on specific customer qualifications. A customer follow up Activity can be assigned to oneself or another colleague. A scheduled Activity will be included in the "Today's Items" list on the day that the assignee is scheduled to follow up with a customer.

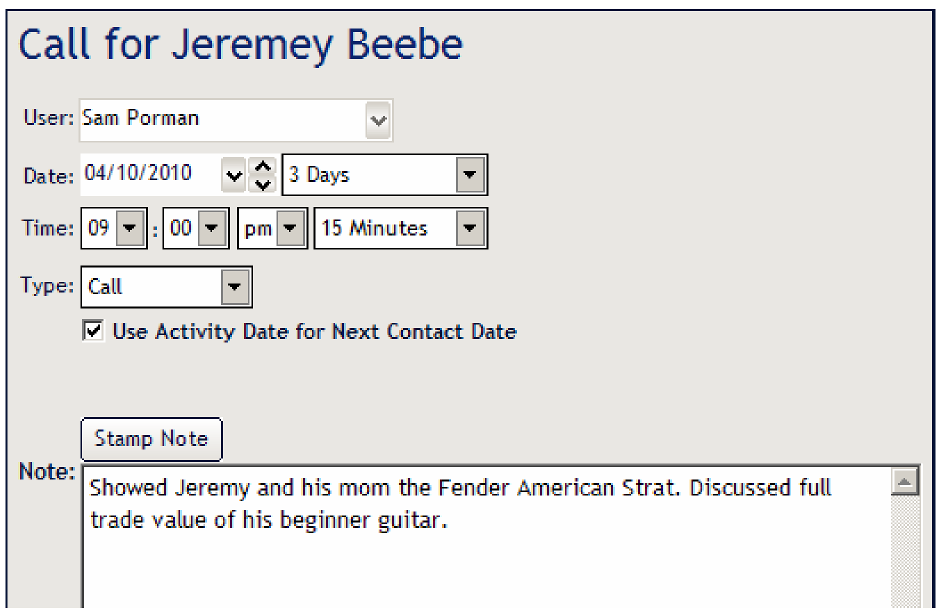
Note: Activities can be included in the "Next Contact" date schedules of the customer notepad system.

The Customer Frontline Activities scheduler is organized so that a sales person can assign a follow up contact for a customer to themselves, or assign a scheduled follow up contact for a customer to another person in the company. For example, a salesperson assigns a follow up call to be made to a customer on a specific date. The assignment will be listed in the note-pad area of the customer record. The customer record will be included on the assigned Activity date when the "Today's Items" icon is clicked by the assignee, not the assignor. In other words, a follow up "Activity" is scheduled by an assignor and implemented by an assignee. The assignor and the assignee can be the same individual, or two different people.
An Activity is scheduled as follows:

Click the "Activities" utility in the top toolbar, click "Schedule a Call".



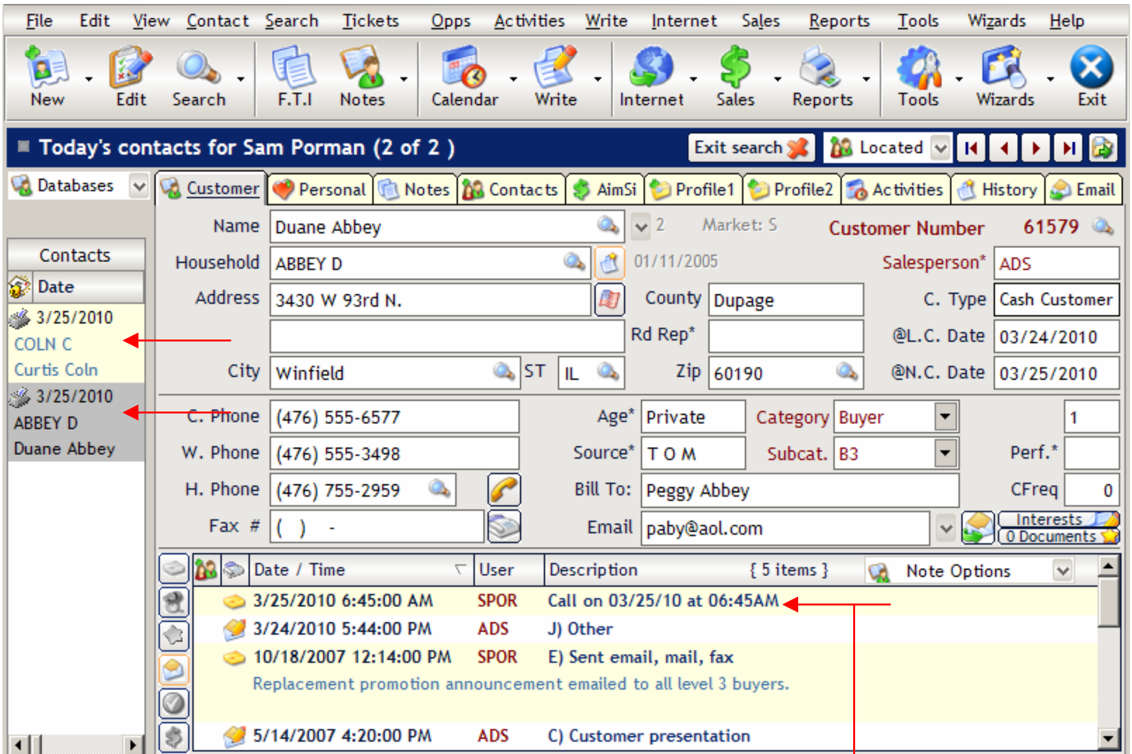
This dialog box below will appear.

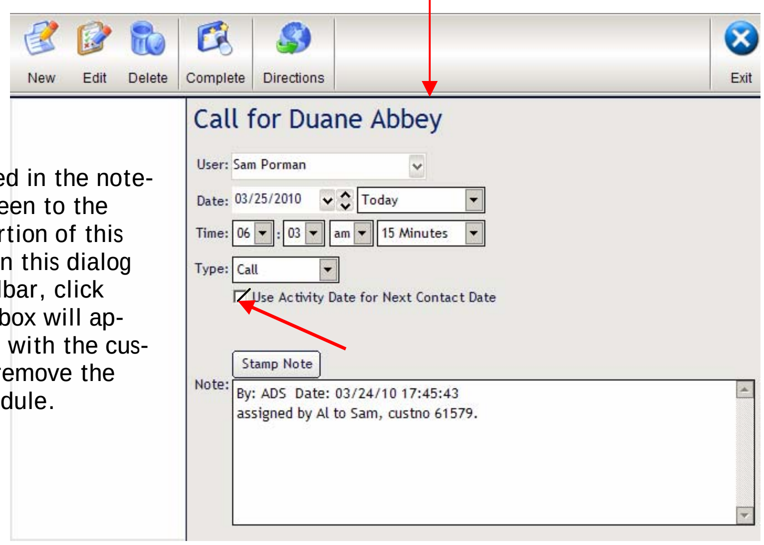


Notice that the assignee is Sam (User). He has posted a call for customer Jeremy Bebee to his follow up schedule for 04/10/10. Consequently, when Sam logs in to Customer Frontline on 04/10/10 and clicks the "Today's Items" Jeremy will be included in his follow up "to do list" for that day.

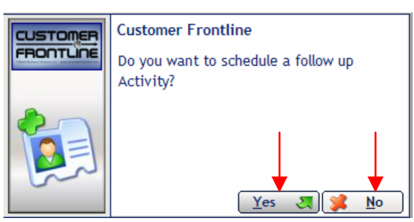
Scheduled activities are displayed in the customer record notepad area, as seen on the next page.

As illustrated below, Customer Frontline is listing two customers with Activities scheduled for 03/25/10. This list and the customer records was organized into a “Today’s Items” Screen Search after user Sam Poorman clicked the “Today’s Items” tab.





A double mouse click on the Activity header listed in the note-pad area will display the Activity dialog box as seen to the right. Note details are displayed in the lower portion of this dialog box. An Activity can be completed while in this dialog box: click the Complete button in the upper toolbar, click “Yes” in the first options box, a second Options box will appear: click Yes to schedule a new future contact with the customer. “No” will close the current Activity and remove the customer from your future “Today’s Items” schedule.



When “Yes” is selected a new Activity dialog box appears to assign a new follow up Activity for this customer, either to yourself or to another person in your company. The next contact date must also be selected in the Date field. Verify that the “Use Activity Date for Next Contact Date” is turned on (see red arrow above).

Review Your Assigned Activity Schedule

The Activity Tab can be clicked from any customer record to review a list of activities assigned to you for all customers. Note the red arrows in the example below is a list of "open" activities assigned to user Frank Stewart. Verify the three settings as noted by the red arrows to review your activities list: 1) turn on "All Dates" or turn this off and select a date range; 2) Select All Contacts; Select your name in the User field.

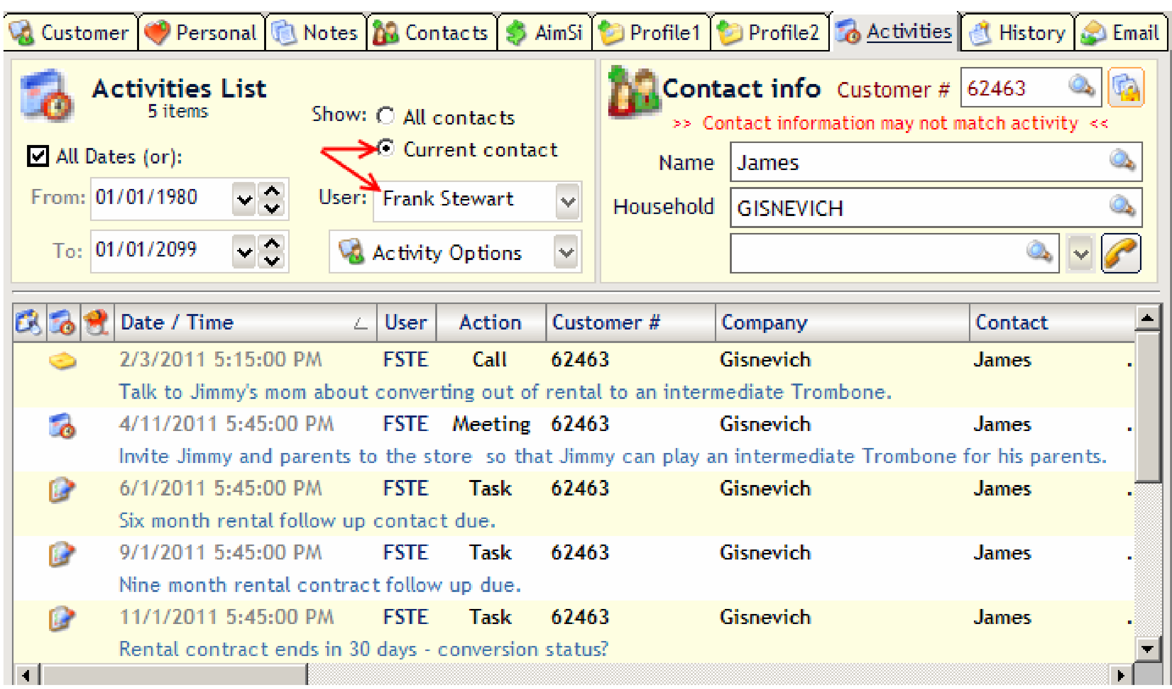
Your Activity list can then be arranged according to the header categories. For example, by clicking the "Contact" header your list will organize your scheduled activities by person regardless of the scheduled contact date. This option can be useful to review a sequence of planned follow ups contacts for a customer.

Planning Future Sales - One Customer at a Time!

Scheduling a sequence of customer contacts is easy to manage with the Customer Frontline Activities utility. Many companies follow a policy to schedule a calendar driven sequence of customer follow ups.

For example, a customer starts renting a beginning level Trombone. The marketing objective is to keep the student playing, sell some accessories and other add-ons, and convert the customer to the purchase of a step up Trombone before the end of the rental contract.

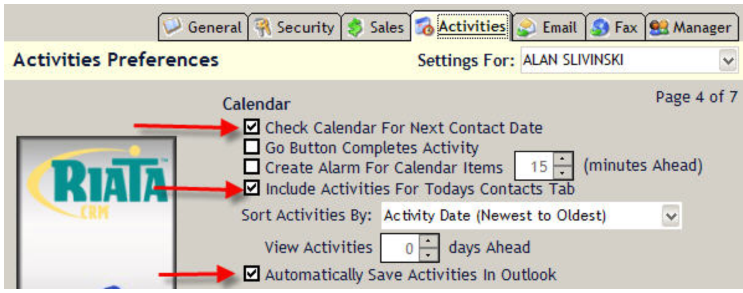
All of the follow up activities to cultivate this sale can be entered and scheduled, with reminder notes, at the time the rental contract is entered into the accounting system. In other words, a salesperson can schedule an Activity in the future months at the time of rental commencement. The opportunity to nurture the rental customer for add-on sales and an eventual conversion becomes a matter pre-planned time sequence. Per the example below, the "Today's Items" tickler file will remind salesperson FSTE when to contact the Gisnevich household on behalf of James the Trombone player to close a step up Trombone sale!



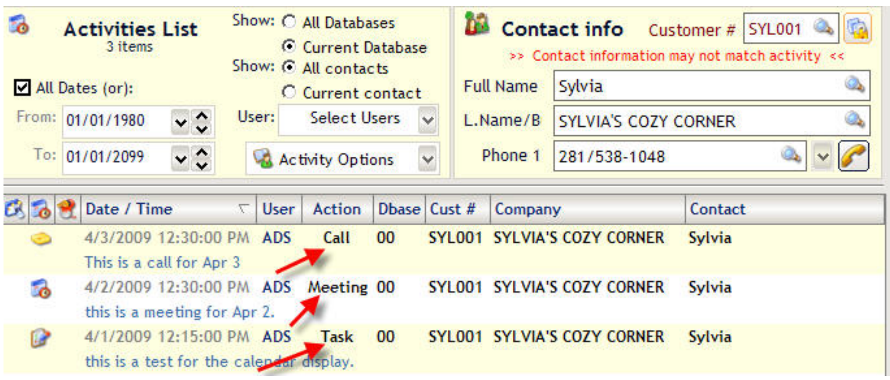
Activities Integrated With The Outlook Calendar Utilities

Customer Frontline will enter scheduled Activities into the Outlook calendar of the user who assigns an Activity to them-selves. If the Activity is assigned to a different person then Outlook will send a request to that user asking them to accept or decline the Activity.

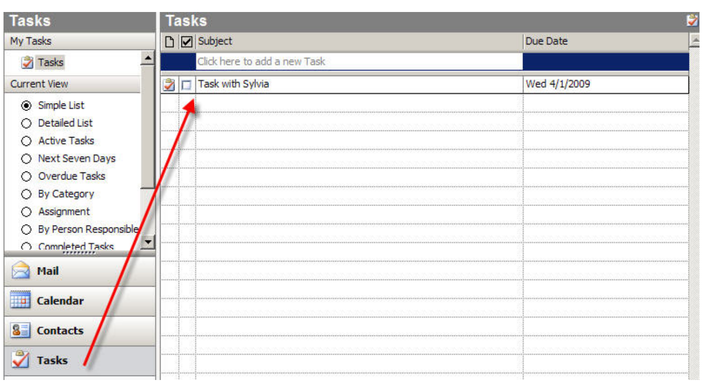
Note: Outlook must be properly installed per LAN - WAN network specifications.
Verify that these three options (red arrows) are turned on in the user settings.

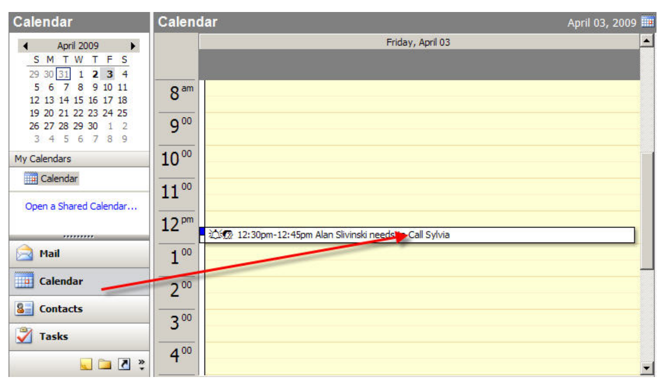


Three types of follow up Activities can be scheduled: Call, Meeting, or Task. Depending on which activity type is chosen will determine where the activity is placed on the Outlook calendar.



The "Task" category of activity is displayed on your Outlook "Tasks" tab on the scheduled contact date. "Calls" and "Meetings" are listed on the "Calendar" tab in your Outlook on the scheduled contact date.





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