

be every week, or every month; it just depends on how many areas/sectors you have to cover and how long it takes to cover each sector or area. Of course, some customers may not want or need you to call as frequently as the plan suggests. Obviously you will want to accede to their wishes while at the same time making sure that when you do call, you are not wasting their time but have something new or important to offer. Sometimes an email or phone call — in between or as a replacement for a “normal” call on your plan — will fill the bill in those circumstances.

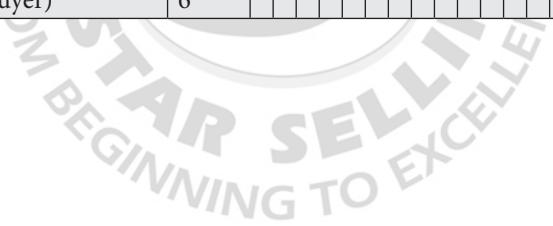
This kind of plan takes time to set up, but once you have it in place you can almost put your call frequency on autopilot and work on other important needs. It's also easy to adjust if changes are required.

CONTACT CALL PLAN METHOD

As mentioned in Chapter 2, the Contact Call Plan may be used effectively when you have to see many contacts at the same accounts. For example, this would be an excellent plan to use when dealing with large corporate accounts. Using a few of the accounts from our hypothetical territory, your plan should start out looking something like this (I have illustrated the plan for a 20-week period).



CHART 7																					
Customer Contact Call Plan																					
		Week Number																			
Customer	Calls/Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Magnus Engineering																					
Jim Baker (Purchasing)	26																				
Ed Snyder (Lab)	12																				
Doris Hall (Lab)	6																				
Florence Bell (Mfg)	2																				
Bill Wake (Mfg)	4																				
Bob Mann (Tech)	4																				
Sally Dunn (Orders)	6																				
Frank Stemm (Mkting)	3																				
Worth Chemicals																					
Dan Benson (Dir Purch)	12																				
Mary Quinn (Buyer)	26																				
Bill Burris (Lab)	6																				
Dave Springer (Mfg)	3																				
Mary Denton (Dir Mkting)	2																				
AA Plastics																					
John Marsh (Purchasing)	12																				
Kathy Davis (Buyer)	12																				
Bob Dark (Tech)	4																				
Aberdeen Furniture																					
Bill Plank (Buyer)	6																				



After you've been following it for awhile, and putting in the call information, it should look something like this:

CHART 8																					
Customer Contact Call Plan																					
		Week Number																			
Customer	Calls/ Year	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Magnus Engineering																					
Jim Baker (Purchasing)	26	C	L	C	C	V	L	C	V	C	D	X									
Ed Snyder (Lab)	12	C					L	V		C	V										C
Doris Hall (Lab)	6						L	V			V	C									
Florence Bell (Mfg)	2				C		V			V											C
Bill Wake (Mfg)	4			C			V			V	C										
Bob Mann (Tech)	4				C		V			V	C										
Sally Dunn (Orders)	6	L			C		V			V	C										
Frank Stemm (Mkting)	3				C		V			V											
Worth Chemicals																					
Dan Benson (Dir Purch)	12	E			X		V	L		V	X										L
Mary Quinn (Buyer)	26	C	C	C	C	V	C	C	C	V	L	C	C								
Bill Burris (Lab)	6		L				V	C		V											L
Dave Springer (Mfg)	3				C		V			G	V										
Mary Denton (Dir Mkting)	2			E			V			V											
AA Plastics																					
John Marsh (Purchasing)	12			L			C	V		L	V	C									L
Kathy Davis (Buyer)	12			C			L	V		C	V										C
Bob Dark (Tech)	4			C			V			V	C										
Aberdeen Furniture																					
Bill Plank (Buyer)	6	C					V			L	V										C

Symbols:
C= Call L=Lunch D=Dinner G=Golf V=Vacation
E= Major Entertainment (Theater, Fishing trip, etc.)

Of course, you can make up whatever symbols you want.

Either method will work very well. There are other approaches, but in my experience, one of these two types of call plans will fit most territories and accomplish the purpose of making the right number of calls on the right accounts (and contacts) at the right times. I used one or the other of these on several occasions with great success throughout my sales career. Put one of them together and stick with it. Organizing one of these plans takes care of the details and leaves you free to spend more time selling.

