

18 Diary management



Aim

To consider the way in which we prioritise certain calls or appointments.



Overview

Participants review a simple four-box appointment management grid, and think about the effect it would have on how they manage calls and appointments.



Numbers

Any number, working in groups of three or four.



Suitable for

Telephone *

On-site *

External ***



What you need

Handout 1 – The brief

Handout 2 – Action plan

Handout 3 – Report back (for evaluation)



Preparation

1. Print out or photocopy Handout 1 – The brief (one per group).
2. Print out or photocopy Handout 2 – Action plan (one per participant).
3. Arrange the room so that participants can work in groups of three or four.



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What to do

Activity **05:00** Groups

Give each group a copy of Handout 1 – The brief, and talk through the model.

Allow them 5 minutes to complete the exercise.

Reflect **02:00** Whole group/Individuals

Ask the groups to report back on the exercise.

Ask them to consider whether their call patterns match the 'classifications' that they have given to their customers.

Conclude **02:00** Whole group

Lead a discussion about the value of managing call patterns.

Ask participants what changes they can make for the better.

Plan **01:00** Individuals

Give each participant a copy of Handout 2 – Action plan, and ask them to complete it.

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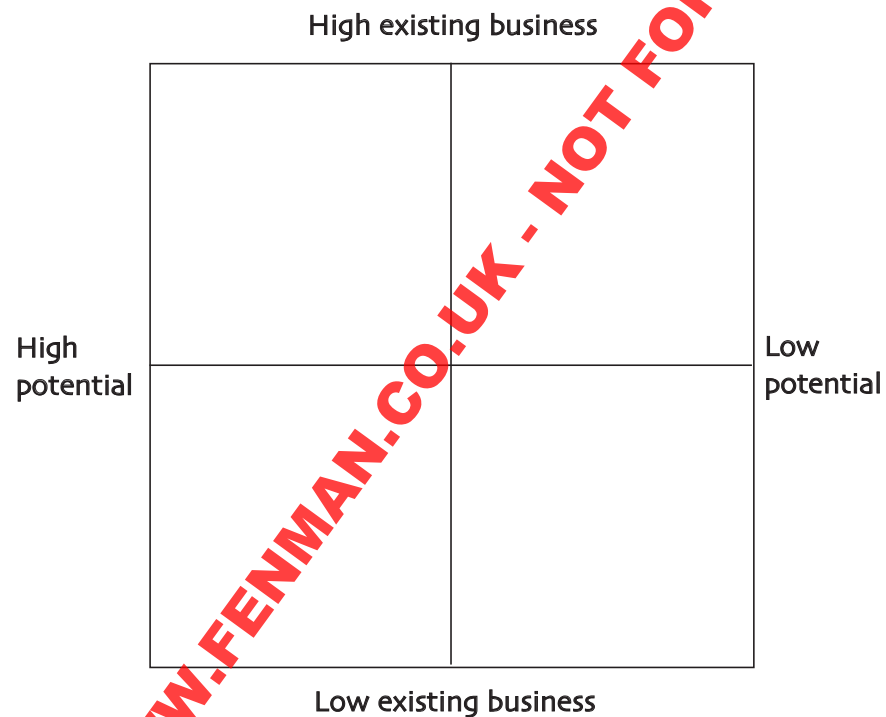
- ☺ **Evaluation**
Three weeks after the session, send each participant a copy of Handout 3 – Report back, asking them to complete and return it.
- **Variation**
You could ask the participants to review their diaries for, say, the previous week, and analyse the classification of the calls they have made.
- ➔ **Follow-on**
This session links well with Session 19 Key Customers, Session 20 Follow-ups, and Session 21 Successful outcomes.



The brief

Being in control of your appointment diary is an important skill for the successful salesperson.

A simple formula to follow is the four-box grid:



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In order of preference, you should make appointments with:

1. Customers with high levels of existing business and high potential.
2. Customers with high potential but low levels of current business (even if they are hard work!).
3. Customers with high levels of existing business but low potential.
4. Customers with low levels of existing business and low potential (even if they are easy appointments and nice people to talk to!).

Which of your customers should you classify in each box?



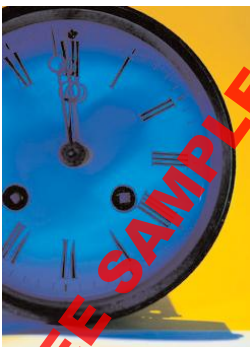
Action plan

As a result of this training session, I am going to take the following action:

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I shall do this by/when: _____

The result I want to achieve is:



Signed _____

Date _____

Report back

As a result of the training session, I chose to:

The result I wanted was:

The result I got was:

I shall now:

Signed _____

Date _____

Please complete this form and return it to:

By (date): _____



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