The Catering Institute™

Time Management:
The Key to Catering Sales Production

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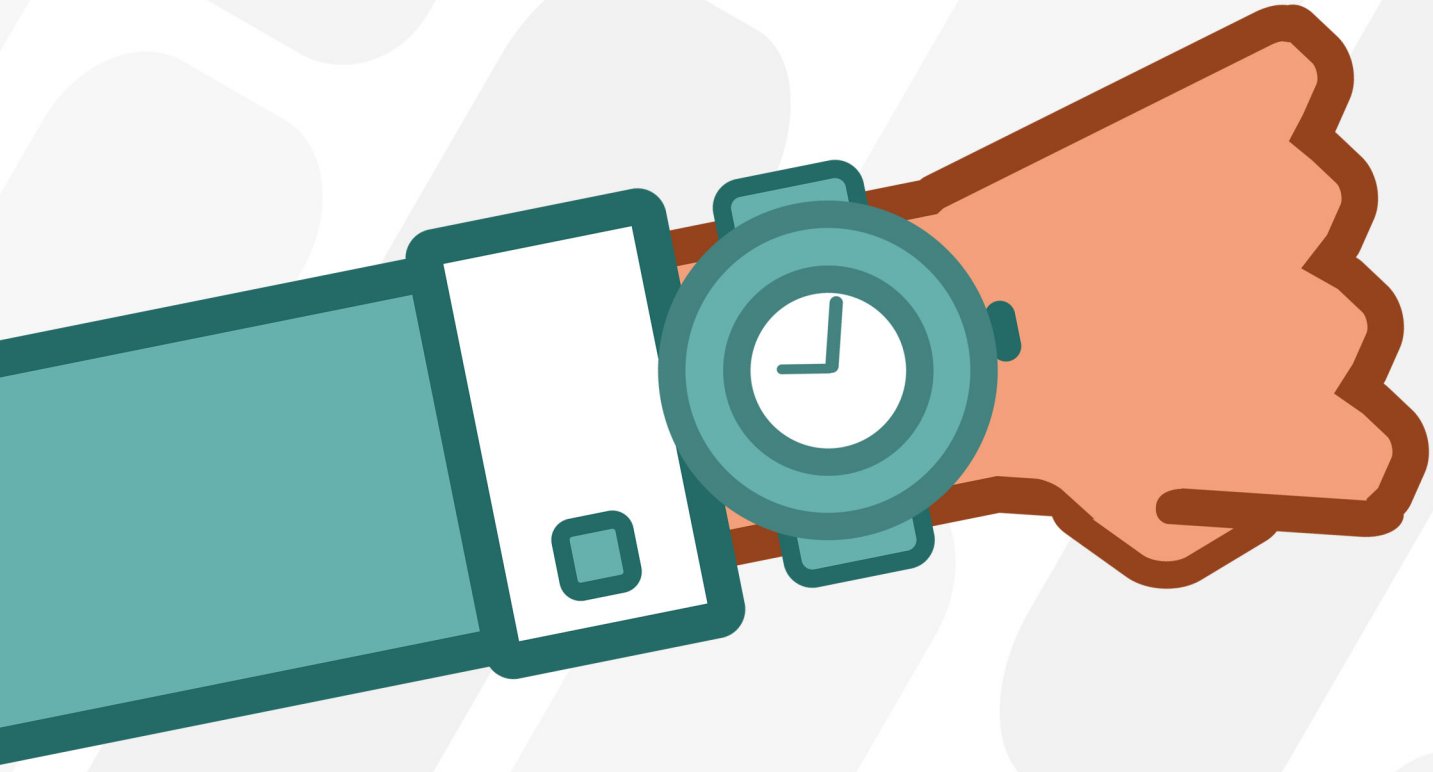

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In a role of leading successful sales team members towards big sales goals, time management stands out as one of the most critical, and most directional subjects to consider, address and build discipline and structure around. Certainly, it is no mystery that the most productive sales professionals have one thing in common – a strong commitment and daily discipline to calendar management as the backbone of highly organized sales habits.

The lesson taught long ago in this great restaurant business, is to plan the work and then work the plan. Simple, sound advice, but in a day filled with the demands of competing priorities and more work than seemingly will fit into one day, the calendar can play a big role in not only getting it all done, but feeling good about accomplishments as things are checked off the list!

Another product of committing all tasks and duties to the calendar surfaces as the really successful sales professionals are able to review the tasks each week and evaluate the effectiveness of where time was spent. These talented folks will enter future weeks by culling those calendared activities that did not produce sales, and building more productive sales activities into the calendar moving forward.

"If you always do what you have always done, you will always get what you've always got," as training expert, Jim Sullivan, at Sullivision.com, has perennially taught. Hitting targets that get bigger and bigger each year points to making conscious changes to what a sales-person is doing, in order to successfully improve and adapt his or her personal productivity to accomplish increased sales goals.

Time Allocation

Essentially, a great place to start, as calendar management and sales planning efforts initiate, is to figure out how time should be allocated between the two fundamental aspects that drive catering sales:

- New customer acquisitions and lead generation.
- Building order frequency through relationship building.

New catering program startups evolve out of the gate at 80% acquisition and 20% relationship building, but, as the database is built and strong execution brings increased frequency, the model can evolve to 50/50 or whatever the program demands in order to hit sales objectives.

As a backdrop to effective calendar planning, personal resource allocation is a great beginning, and the next step would be to identify sales activities associated with each of these two areas. What are the activities you will invest in to drive new customer acquisitions? And, what activities will you engage in that expand and enrich relationships with those key "big spenders", or potential big spenders in your area?

> *"The lesson taught long ago in this great restaurant business, is to plan the work and then work the plan."*

Through leading and observing sales activity, it has been found that high sales activity equates to high sales growth.

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Customer Acquisitions Activity

- Canvassing – cold calls to offices with food samples.
- Harvesting in-store leads from fishbowl – encourage. store visitors to drop their business card in a container for more information.
- Working the restaurant during busy periods seeking potential customers.
- Cold calling – dialing for dollars.
- Presentations – show and tell for "A" Leads.
- Referral acquisition.
- Following up – or converting all of the above.

Customer Relations Activity

- First-time order calls.
- Lapse or lost user calls.
- Selling holiday outreach calls / emails. (reference MMS Catering Calendar)
- Referral calls / follow-up.
- Prior year quote follow- up calls / emails.
- Recurring events/ big order follow-up.

Calendar planning and time management center on effectively and efficiently scheduling these activities each day, each week, each month, each quarter, each year. As mentioned earlier, consistent review of the activities or tasks to evaluate and assess the productivity of each is a good way build on success.

Another best practice is networking and sharing best practices with peers – internally and externally. The best ideas always come from those on the frontlines who are making calls and generating leads everyday. Creative approaches to finding new customers and best ways to make connections and build relationships are evolving daily. Tuning into what is happening is a great way to evolve productivity – but as with all the other activities listed here, peer networking should be planned on the calendar as there have been instances where an over-allocation occurs with networking and the more productive, sales generating activities are compromised, therefore resulting in lower sales activity. Once again, make the plan, get it on the calendar and then focus on execution.

Winning Habits

A quick look at any list of relationship building activities reveals a dominance of call activity. Connecting with existing customers by phone is most effective at building relationships. The phone connection allows interaction, the use of open ended questions, and for more information to be gained versus email.

A key concept is blocking time on the calendar for calls and then repeating similar calls consecutively. Repeating the pattern of the call leads to consistency in gaining the right information, makes voicemail messages clear and succinct, and allows for a rhythm and flow that leads to efficiency and productivity. So blocking time and then completing all first time order calls, then moving to all lapse user calls, etc. will produce better results and allow for more calls per hour.

> *"Another critical consideration in blocking time is travel. Think of it like this – any time spent in the car, train or plane takes away from the phone or "takes one off the sales floor."*

Another best practice for calling vis to alert everyone who may be working nearby that it is "call time." Close the door, if there is one, and hang a sign up that calls are in progress. With no door, it is critically important that co- workers understand that time has been blocked and calls must be completed without interruption.

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Another critical consideration in blocking time is travel. Think of it like this – any time spent in the car, train or plane takes away from the phone or "takes one off the sales floor." Just like blocking time for like calls in the previous illustration, blocking those activities associated with travel, like canvassing, going to a sales presentation, or harvesting leads in the restaurant, is very important.

> *"The road to greater efficiency in catering sales production is not only built on winning habits like blocking time, but it is important to understand what kinds of things enter the picture as "derailers" of personal sales productivity."*

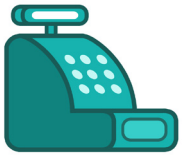
Through working the calendar, there will be a sense of planning time away from the phones in a productive manner. Are clients and potential clients to be visited potentially big spenders? Is the office building to be canvassed full of "A" Leads? Are there multiple ordering administrative assistants lined up for sampling / presentations? In other words, is the investment of time being qualified, just like a great sales professional qualifies a potential buyer?

There is no magic method associated with allocating the right amount of time to the number of activities, but when those activities are captured in a clear plan and placed on the calendar, an effective means of review and evaluation is produced and great salesmanship can be applied with a level of precision that leads to greater sales.

Productivity Derailers

The road to greater efficiency in catering sales production is not only built on winning habits like blocking time, but it is important to understand what kinds of things enter the picture as "derailers" of personal sales productivity.

Allowing non-sales activity to consume calendared tasks and events associated with sales building can quickly erode productivity. There are often situations where managers are asked to evaluate sales teams because sales are not materializing as expected. Frequently, it is found that sales team members are pulled into operational tasks, are engaged in order activity, or answering order calls that prevent full focus on planned sales activities. Sometimes up to 80% of a dedicated sales position is consumed by activity unrelated to building sales.



"The cashier didn't show up today, so I helped out the team by running the register at lunch."

"The catering vehicle was dirty so I took it to get it washed and cleaned."

"They were short staffed at the restaurant and I had to help get the order together. This was an important client and I needed to make sure it was right."

"I have had real problems with this restaurant's execution, so I spent some time training the team and getting it right!"

Sound familiar? While all of these things are important, dedicating time to them means that time is taken away from sales building activity. If activities are on the calendar, noting the kinds of things that come up and tracking the activity lost to them is a good step towards helping organizational leadership understand the importance of sales focus and provides a rational means by which to communicate the challenges faced.

Likewise, having a good plan of activities that is communicated to leadership and operators, lets the

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team know and understand the value of the sales activities, particularly when those activities can be connected with orders and repeat business coming from the relationships built.

A good customer relations management tool and technology play big into this capability and is requisite to maximized sales production, but tools and systems are only productive if great sales habits and organized, focused sales planning is being accomplished consistently.

Often, great customer service champions, who find themselves placed in a sales position, enjoy taking customer orders and get great personal satisfaction from taking orders, while the customer appreciates the great service and personal attention. All positive, right?

Well, not exactly. In order to scale growth and maximize it, separating order taking from sales activity is imperative. When order taking consumes the day, week or month and no time is dedicated to keeping sales activity cranking – the point of diminishing return is hit and the growth will be contained at that point. Good, positive things happen at first, as sales start to climb, but soon, the sales team member cannot sell because the order activity consumes them.

Also, when consistently high sales activity is not followed by catering sales growth, the root causes can be traced back to:

- Inconsistency in sales skills or activity execution
- Inconsistent or sporadic execution and follow-up
- Investment of time in non- productive activity (as illustrated above)

Phone calls are not returned, incoming email is not replied to in timely fashion, and calendared activity is cancelled or postponed due to distraction with non-sales activity.

How are presentations being executed? Are the right questions being asked when making calls? Are all voicemails left being followed with email? Is all the information gained being captured in a CRM tool?

The point here is that somewhere on the calendar, the constant review of sales skills and sales talent building must occur. Time must be set aside to concentrate on development of better skills and better talents.

Sales coaching, sales counseling and strong relationships with a group of peers to rehearse and role play are the things that can make a difference in this area.

Bringing It All Together

If direct sales work was easy, everyone would be doing it. The fact is it is not for everyone! Driving catering sales requires strong focus, organization, and commitment. It all starts with a game plan:

- Try a quarterly game plan format. Plan out 13 weeks of activity, get it on the calendar and then focus on execution.
- Pause at the end of each week to review the activity. Which activities were most successful? Did all calendar items fit in? Was any time wasted/ did competing priorities sneak in to consume time?
- Reshuffle, re-organize and attack – weekly.
- Make outbound sales calls part of every working day!
- Align with a peer or coach, or recommit to an internal sales director. Get help with skill development.

Then go get it! The sales are out there as growing numbers of people are engaged in ordering food to feed groups of people where they live, work and play. Find them, and then keep them.

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About The Catering Institute

The Catering Institute is a leading educator in takeout, delivery and catering, providing training, certification and consulting to restaurant operators and their teams.

The Catering Institute is a private, independent academic institution. Led by founder and CEO Erle Dardick, the faculty at the Catering Institute is passionate about helping brands excel at feeding their customers where they Live, Work & Play™.

Learn more:
www.cateringinstitute.com

Get Catering and Grow Sales!™

A Strategic Perspective for the Multi-Unit Restaurant Executive

By **Erle Dardick**

About Erle Dardick

Erle Dardick is a 17-year catering veteran, business turn-around expert and author, best known for helping multi-unit restaurant executives create successful catering revenue channels. Erle founded both MonkeyMedia Software and The Catering Institute. He is also the Author of "Get Catering and Grow Sales! A Strategic Perspective for The Multi-Unit Restaurant Executive."

About Wayne Alexander

With 16 years of experience and a hands-on style founded in operations and servant leadership, Wayne has established catering as a sustained accelerated growth platform. Through sales force talent development, organizational alignment in the multi-unit franchised environment, centralized call center management, and program development, Wayne reaches catering decision makers at their time of need.

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As Partners in Education, MonkeyMedia Software, PepsiCo Foodservice, and Catering Insights work with the Catering Institute, to help restaurant operators grow sales and increase profits by educating them to become experts at feeding their customers where They Live, Work and Play™.

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