

Managing Salespeople

Salespeople are part of an overall team. When a salesperson tries to work independently, the results are not always very effective.

This activity highlights an ineffective situation for a mobile home loan salesman for a bank. Review the situation – what can you recommend to improve the firm’s current sales appointment practices?

Their Sales "System"

When customers phone the bank’s call center and inquire about a home loan, they are always offered an appointment the mobile home loan salesperson (who will come out and visit them).

If they are interested, the appointment is then immediately booked in the mobile lender’s electronic diary.

Each day the mobile lender checks his electronic diary and goes to the scheduled appointment/s.

However, the mobile lender has become very unhappy that the call center is making appointments with people who are not ready to buy yet (many just want information).

He is complaining that the call center “is wasting his time” and wants something done about it!

Student Discussion Questions

1. Why is the salesperson unhappy in this situation?
2. Would the call center staff be happy in always passing the sales inquiry to the salesperson? Why?
3. How did this disorganized situation occur? (Who's at fault?)
4. What would you recommend to improve this situation/practice?