

# SELF-MANAGEMENT IN THE FIELD



**Effective self-management is vital for field sales**

The sheer volume of communications, interactions and administration involved in field sales demands maximum flexibility, mobility and self-organisation. But there are proven methods that will help you prioritise and schedule tasks.



# CONTENTS

- 1. Focusing on Action and Flexibility .....4
- 2. Nobody Is Perfect: Implementation in Day-to-Day Business .....7
- 3. Don't Fool With Your Tools: The ALPEN Method.....10
- 4. If the Wind Blows, Ride It: Analysing Yourself and Your Environment.....14
- 5. Insanity or Self-Discipline .....17
- 6. 9 Tips for Self- and Time management.....18
- Further Reading.....19
- About the Author .....19

# SUMMARY

When it comes to time management theories, the paradigm of “decision, planning, control” is at the heart of self-management best practice. Flexibility in implementation and reflection is often overlooked. But the sheer volume of communications, interactions and administration involved in field sales demands maximum flexibility, mobility and self-organisation. By combining the principles of action (value creation) and flexibility (time management), you can sustainably organise yourself in a sales environment.

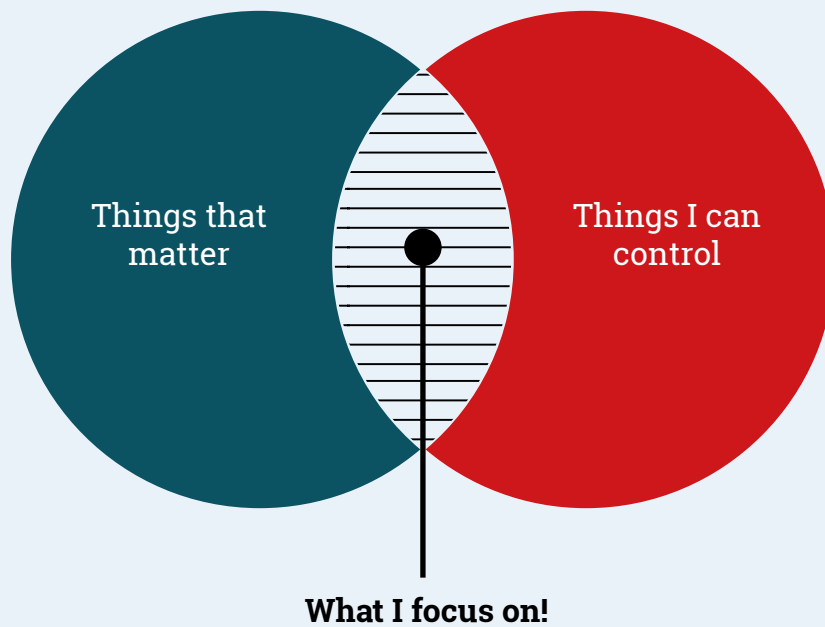
To that end, I'll cover behavioural psychological insights, such as the “planning fallacy” and the irrational emotions that influence our day-to-day self-management. I'll show you the ALPEN method I use to outline best practices for daily and weekly operational planning. Using this tool to analyse yourself and your environment, you'll discover how to work more efficiently with methodologies and disciplines that eliminate time-sinks.





# 1. FOCUSING ON ACTION AND FLEXIBILITY

When considering how field sales personnel organise themselves, it pays to think of time as economic capital. Time is a valuable resource which is either available or can be created, in order to be invested wisely. The main aim of efficient self-management is to free up time to sustainably improve quality, or boost sales and revenues. Of course, it's up to you whether you want to invest the time saved in sales activity or to take pressure off yourself. Sales representatives face both strategic (medium to long term) and day-to-day operational challenges in deciding which activities are most beneficial to sales. These include, for example, deciding which customer to contact next, or whether more time should be spent looking after existing customers than winning new ones.



*Diagram 1: Focusing on Action*

- 1. What is really important?**
- 2. What can be actively managed/controlled/implemented?**

We need to constantly assess which sales priorities or projects can be managed or implemented under our own steam. Within the sales plan and strategy, that raises two further questions:

- 1. Which objectives or customers are strategically relevant to sales?**
- 2. What practical steps can I actively take?**

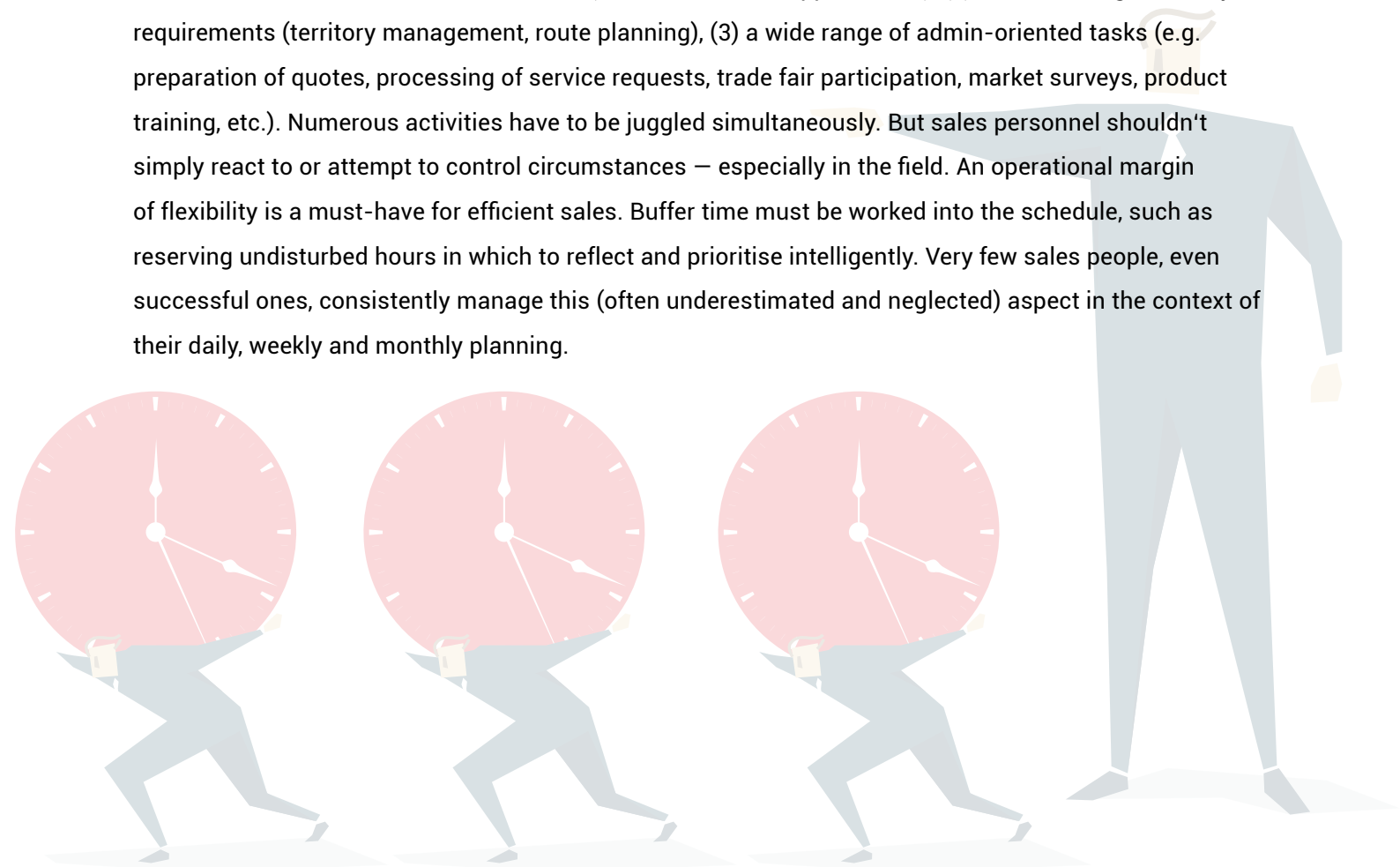
The need to evaluate each urgent action to be addressed (measures, implementation activities, projects, decisions), is a reminder to focus on the essential. But experience shows that this focus is often ignored or not always maintained in day-to-day sales operations. This primary focus on taking action—the strategic orientation and self-directed implementation of sales-efficient measures and decisions—can be illustrated using the principle of value.

## “Not just quantity, but quality”

There are still organisations whose sales representatives play a numbers game, running from one appointment to the next to meet the prescribed minimum of customer visits by the end of the week. This quantitative approach contradicts the strategic principle of value when it comes to contacts and customers. So instead of arbitrarily making dozens of appointments in order to, say, re-visit ten existing low-value customers, field personnel should focus their efforts on higher quality customers and prepare their activities accordingly.

## “Planning and control are good— but you need flexibility, too.”

For organisations to efficiently tackle sales time management, they must make allowances for the **specific conditions and demands** of the sales environment. This is typically characterised by (1) a high volume of communication and interaction (with customers, suppliers, etc.), (2) above-average mobility requirements (territory management, route planning), (3) a wide range of admin-oriented tasks (e.g. preparation of quotes, processing of service requests, trade fair participation, market surveys, product training, etc.). Numerous activities have to be juggled simultaneously. But sales personnel shouldn't simply react to or attempt to control circumstances — especially in the field. An operational margin of flexibility is a must-have for efficient sales. Buffer time must be worked into the schedule, such as reserving undisturbed hours in which to reflect and prioritise intelligently. Very few sales people, even successful ones, consistently manage this (often underestimated and neglected) aspect in the context of their daily, weekly and monthly planning.





## 2. NOBODY IS PERFECT: IMPLEMENTATION IN DAY-TO-DAY BUSINESS

Self-organisation and time management in the field shouldn't be considered in black and white terms such as control and flexibility or importance and urgency. Both rational and emotional factors come into play. Self-management isn't just about being cool-headed but also relies on gut feeling, which fluctuates with our moods. Within this psychological tension lurks the **phenomenon of planning fallacy**. (Kahneman/Tversky, 1979). In his book "*Die Kunst des klugen Handelns*" (The Art of Clever Action), Rolf Dobelli hits the nail on the head: "You compile your task list in the morning, but how often do you manage to complete all the tasks by evening? Always? Every other day? Perhaps once a week? If you're like most people, you will only have ticked off every item on your to-do list about every 20th day. So you're planning too much. It's simply absurd how much. That would be forgivable, if it were your first day on this planet. But you've already been drawing up to-do lists for years, if not for decades. Therefore, one would assume you wouldn't overestimate your ability to get things done day after day. . . . Although you're aware that most of your previous forecasts were too optimistic, you still believe in all seriousness that you're exceptionally realistic today."



What are the reasons for this failure to achieve? An obvious psychological explanation is our **wishful thinking** (Bühler et al, 2012). We want to count our successes and hit or even exceed planned sales and revenue targets. As performance-oriented sales people, we of course want to achieve everything we set out to do. The outcome of such an ambitious plan is not absurd, but rather predictable: due to the lure of anticipated success, our action points and to-do lists tend to grow. Whether consciously or unconsciously, the mantra is: "I'll deal with it all today!"

In this familiar drama of expectations and reality, another closely-related phenomenon often comes into play: **our overconfidence in our personal power to take action or make an impact**. Due to a strong goal-oriented, yet overly rigid focus on the plan and the target, we block out our environment – which exists independently of us – to some extent. On one hand, we repeatedly underestimate time-consuming external factors (e.g. customer complaints, service requests, schedule changes, technical breakdowns, etc.). On the other, we overestimate our ability to control them.

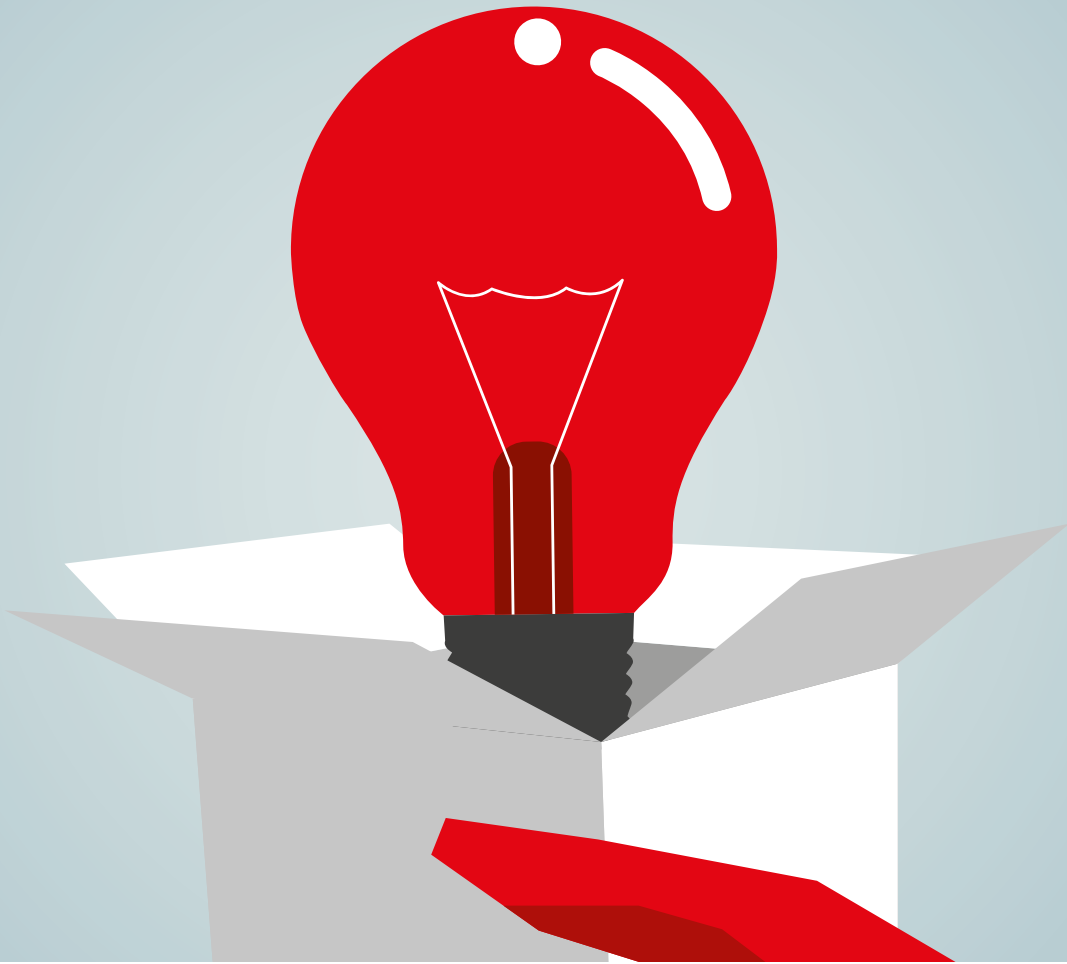


## “The Power of Emotion.”

As well as misjudging the time needed to complete a task (planning error) and the overestimation of our personal power over implementation, our feelings also thwart us. Our prevailing mood and emotions often determine our decisions as well as our ways of working and behaving. Kahneman (2012) describes this as a **dominance of emotion**: on an emotional level we tend to prefer dealing with simple, discrete, known tasks to working on complex, protracted and unknown tasks. Or in other words: since thinking is more difficult than feeling, we're often guided in our daily business dealings by our emotions, preferences and habits. And of course, procrastination may also be lurking around the corner.

What can we do about all these behavioural traits and irrationalities? Let's be honest, we're not robots. Since planning mistakes are human, it's advisable to plan future activities more realistically—in terms of time management—and with a good measure of flexibility.





### 3. DON'T FOOL WITH YOUR TOOLS: THE ALPEN METHOD

A classic time management technique for daily and **weekly planning** is the so-called ALPEN method which is briefly explained below. Time management expert Lothar Seiwert (1998) argued for its application that by investing just eight minutes in writing and mentally planning our workday, we gain approximately an extra hour in our day. But whether we actually save an hour, 30 minutes or two hours isn't important. However, two significant advantages of consistently applying the ALPEN method need to be emphasised:

#### Focus on action

➔ By writing down and retaining our planned projects and tasks every day we obtain a **realistic view of the potential scope and duration of execution** as well as the completion of important, sales-efficient activities (focus on action).

#### Flexibility of action

➔ **Through clearly assessed task prioritisation with planned buffer times** we create leeway for variable action and decision-making (flexibility of action).



## Activities and Tasks Need to Be Written Down

“Your mind is for having ideas, not holding them.” (David Allen, Time management Expert)



### Daily and Weekly Planning

**A** ctivities

**L** ength of Time

**P** lan buffer times

**E** stablish priorities

**N** ote

Diagram 2: THE ALPEN METHOD

The **principle of putting things in writing** is a prerequisite for self-management. Nevertheless, some still underestimate or even ignore it. The benefits of regularly writing things down—effectively creating a to-do list—are obvious:

**Relief:** → We decrease reliance on memory

**Focus:** → We focus our concentration on the essentials

**Motivation:** → We can enhance our self-motivation

**Documentation**

**and control:** → We don't lose track of unfinished business

Not all tasks need to be written down in meticulous detail. In conjunction with the ALPEN method, the immediate or direct principle helps: throughout the day we should immediately address all of the smaller tasks that take no longer than five minutes to perform—what's done is done (e.g. a brief reply to an email, filing away a contract, following-up a calendar entry, etc.). That is: either perform the task immediately, stop it immediately, archive it immediately or delete it immediately.

*Because she could no longer bear her husband's obsessive punctuality, 33-year-old American Myra Cornillis pushed her 32-year-old husband, a university professor from California, over the edge of the Grand Canyon. The professor's notebook was later found at the bottom of the gigantic gorge. It turned out that he'd planned his anticipated daily schedule to the minute every morning and also abided by it—including relations with his wife. However, what he hadn't foreseen was that on that day, at exactly at 9:20 a.m., he'd experience the Grand Canyon, one of the greatest sights in the world, in this manner. Extenuating circumstances are expected to be considered in the case against the perpetrator who'd obviously been frustrated for many years.*

Source: "Looking Through The Economy", 1987

## L

### Length of Time Needed to Complete Tasks Must Be Estimated

After we've jotted down all our outstanding tasks, newly-added tasks or recurring activities, we move on to the next relevant step: roughly estimating the planned execution time for all tasks, specified in minutes.

Although this may initially appear unusual to ALPEN newcomers, we discipline ourselves by mentally running through our tasks like a flip book. There are often plausible reasons for assuming that the execution of a task takes as long as the time that has been set aside for it. However, the primary motto should be: it's better to misestimate than not to estimate at all. During a scheduled weekly check-up, you can then verify the estimated completion time with the benefit of hindsight and analyse it if necessary. The next step is then to add up the execution time of all noted tasks.



Be realistic. Be realistic. Be realistic.

When planning and implementing medium-sized tasks or smaller projects that, for example, will take longer than two hours to complete, list further specific individual steps in detail. So don't simply enter "Organise my wife's birthday party" or "Start telephone prospecting" in your calendar, but pre-structure the content of these project-like activities. Of course, you'll need to plan time accordingly for this.

## **P**lan and Reserve Buffer Times

As previously mentioned, this step is the most influential in scheduling and ensuring personal action flexibility. The **60:40 principle** says that we shouldn't plan more than 60% of our working time. The remainder is set aside as buffer time, for example, for spontaneous work preferences, self-initiated activities and decisions (20%) and for the unexpected—things that are thrown at us from the "outside" (20%). If, for example, a sales representative works 10 hours a day, he shouldn't plan the entire 600 minutes. The 60:40 principle is, of course, only a rule of thumb. Provisions must be adapted to individual requirements and conditions. But at the same time, the scheduling of buffer times forces us to establish priorities.

## **E**stablish (Daily) Priorities

- ➔ Apply the Eisenhower method of distinguishing the urgent from the important
- ➔ Priorities should only be used for emergencies: What is really important today? What costs would be incurred or what value would be lost if the job weren't performed today?
- ➔ A stronger focus on a weekly basis can also help. From a psychological perspective, we should ideally tackle our day-to-day priorities in a relaxed manner, because it's disruptive to constantly have to make decisions. The **phenomenon of decision fatigue** has been scientifically and reliably examined in numerous studies (Baumeister, 2002).

## **N**ote

And, of course, we need control. The daily, weekly and monthly control of our task planning and completion using scheduled check-ups (for example through the use of recurring reminders in your calendar) is a good way to continuously optimise self-management.



## 4. IF THE WIND BLOWS, RIDE IT: ANALYSING YOURSELF AND YOUR ENVIRONMENT

A classic time management tool is inventory analysis. By systematically analysing yourself and your environment, you're essentially identifying and arresting "time thieves" and uncovering further potential savings through self-management techniques and better ways of working.

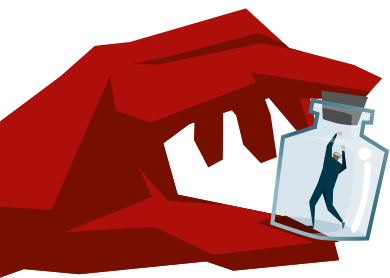
- **Where are my (hidden) time thieves? Which of them can I eliminate?**
- **How can I work more sales-efficiently? Which self-management techniques can help me get things done?**

These questions should be examined as accurately and realistically as possible for their personal, social and structural impact.

**Personal level: My own strengths and weaknesses.** This is a matter of identifying personal time thieves and becoming competent at applying sound time management techniques. Do I have, for example, a vague objective, or is my daily and weekly planning insufficient? Do I always have a complete overview of my activities? Do I set targeted priorities? Am I maintaining a sufficient time buffer? But also: what is the real situation with my self-discipline and behavioural habits? The good news is that we can deal with, change, and optimise our learning potential and time savings ourselves.



**Social level: Support and restraint.** At this level, we can take a systematic look at our current communication with the people we interact with (for example, external and internal contacts, customers). How can we make our work-related communication processes even more efficient? Unlike the personal ego level, where we're solely responsible for change and optimisation, the focus here is on our involvement with others. Although we can only make select changes within a given situation, a systematic analysis can nevertheless lead to smoother communications in the longer term, such as liaising with external sales, internal sales and customer service, with prospects and customers, or when defining sales territories.



Grant me the serenity to accept  
the things I cannot change,  
The courage to change the things I can,  
And the wisdom to know the difference.

Reinhold Niebuhr (1892-1971)

**Structural level: Bridges and barriers.** At this level, we can attempt to act as an “environment manager”. Which administrative or technical processes could be implemented in our environment or designed somewhat more efficiently? Examples include the use of digital tools/CRM systems, or the optimisation of administrative processes. Our guiding principle should be that we don't consider everything to be completely and utterly unchangeable. Become something of an “environment manager” yourself in the future, particularly against the backdrop of ever-increasing digitisation, consolidation and acceleration of our work environment.

Dimension	Action Focus/Competence
<b>Myself (personal level)</b>	<b>Recognise personal strengths and weaknesses:</b> e.g. detaining time thieves, establishing clear objectives, maintaining an overview of daily/weekly planning, priority management, optimising work style, habits, self-discipline
<b>Others (interaction level)</b>	<b>Recognise support and restraint:</b> e.g. making more telephone appointments rather than on-site visits, internal communication processes
<b>Environment (structural level/ underlying conditions)</b>	<b>Question bridges and barriers:</b> e.g. use of electronic devices, internal corporate administrative processes

### Self- and Environmental Analysis:

Put together an analysis of your status quo along these three dimensions.

- ➔ Consider the things you can actively change yourself or where an attempt could realistically pay off.
- ➔ Try to estimate the potential savings in minutes or hours (e.g. per week).
- ➔ Improve your self-management skills and try out time management techniques for your style of working.





## 5. INSANITY OR SELF-DISCIPLINE?

**Definition of insanity:** *"Insanity is repeating the same mistakes and expecting different results"*

Rita Mae Brown

Critics of traditional time management concepts argue that much of that which deals with time is resistant to therapy. This is because most of our behaviour with regard to time is based on our habits, routines and attitudes, which we've repeated, learned and physically internalised over years and decades (→ at the personal level). Personal time management is obviously learnable—through reflected adoption and the consistent application of **principles-based self-management skills**. Even classical time management techniques – such as the ALPEN method outlined here – are useful in providing us with a framework for orienting ourselves toward objectives and results, and for planning action flexibility.

A significant aspect overlooked by many time management concepts, however, is the **distinction between individual and organisational problems and time-saving options**. An opportunity to improve on classic time management techniques can be found in the increased awareness of **psychological and individual factors** (e.g. personal working style, biorhythms, behavioural psychological phenomena, emotions). Particularly against the backdrop of relentless consolidation, digitisation and acceleration of our work environments, contemporary self-management should look "outwards". Pragmatically questioning our respective **interactions and working environment** (embedded in existing communication structures, processes and information) shouldn't be neglected through laziness or force of habit.

# 6. 9 TIPS FOR SELF- AND TIME MANAGEMENT

The following nine tips will help you to get started with your time- and self-management. Print out this page and hang it on your office wall, or fold it and carry it with you. Review it again and again. It will remind you and help you to better plan and organise your day.

*"A fool with a tool is still a fool."*

## **Learn principles-based self-management techniques**

- Selectively optimise your self-management skills and try to integrate into your daily routine appropriate techniques for your work style as well as the principles-based methods.
  - Schedule sufficient buffer time, "quiet hours", time to organise and prepare as well as rest periods (action flexibility) by applying, for example, the framework of the ALPEN method.
  - Pay particular attention, especially in the sales environment, to the integration of your strategic objectives (sales plan) with your daily or weekly planning (action plan).
- 

*"We're all only human."*

## **Be realistic and mindful of psychological and emotional factors**

- Regularly scrutinise your personal habits, attitudes, work preferences and beliefs as they relate to your priorities and their underlying criteria (action focusing).
  - Also observe and consider behavioural psychological phenomena (planning fallacy, dominance of feelings, decision fatigue) in your self-management.
  - Attempt to be more realistic in your assessment (what activities and measures can you personally implement?).
- 

*"You can't stop the wind—but you can build windmills."*

## **Design your communications and your environment more efficiently**

- As an "environment manager", systematically examine current interactions and communication processes for opportunities to change.
- Eliminate distractions and external disturbances.
- Communicate the difference more clearly (e.g. external disruptive forces).

The paradox of following these recommendations? You need to schedule time to put them into practice!

## Sources

- ➔ Andreas Buhr (2012): Vertrieb geht heute anders. Wie Sie den Kunden 3.0 begeistern GABAL Verlag, 4th Edition
- ➔ Roger Buehler, Dale Griffin, Johanna Peetz: The Planning Fallacy: Cognitive, Motivational, and Social Origins. in: Advances in Experimental Social Psychology. 43, 2010, page 9.
- ➔ Rolf Dobelli (2012); Die Kunst des klugen Handelns, Carl Hanser Verlag
- ➔ Stephen R. Covey (2007): Der Weg zum Wesentlichen, Campus Verlag
- ➔ Daniel Kahneman, Amos Tversky: Intuitive prediction: biases and corrective procedures. in: TIMS Studies in Management Science. 12, 1979, pages 313–327.
- ➔ Daniel Kahneman (2012): Schnelles Denken – langsames Denken, 19th Edition, Siedler Verlag
- ➔ Dirk Kreuter (2010): Verkaufs- und Arbeitstechniken für den Außendienst, 4th Edition, Cornelsen Verlag
- ➔ Peter Schreiber (2014): Vertriebsstrategie: Ein Selling-Plan hilft beim Umsetzen
- ➔ Lothar Seiwert (1998): Wenn du es eilig hast, gehe langsam.
- ➔ Walter Simon (2007): GABALs großer Methodenkoffer. Grundlagen der Arbeitsorganisation, 2nd Edition, GABAL Verlag
- ➔ Kerry Patterson, Joseph Grenny, Ron McMillan, Al Switzler (2005): Heilsame Konflikte

## About the Author

**Andy Rohrwasser**, Communication Trainer and Business Coach: Andy Rohrwasser founded the training agency "arowa" Training - Coaching - Seminars in Freiburg in 2007. He is a sociologist and has worked as an independent financial consultant and as HR and sales training manager for a global corporate group. His main focus as a consultant and training expert is telemarketing, sales, time- and self-management, leadership and team development. Together with his "arowa" team he conducts public seminars, in-house training and business coaching nationwide and assists companies in the area of project consulting for human resources, sales and strategy. Further information: [www.arowa-trainings.de](http://www.arowa-trainings.de)



# Resources to increase business agility

Additional white papers and case studies are available at

[www.gotomeeting.com.au/meeting/hd-video-conferencing-resources/documents](http://www.gotomeeting.com.au/meeting/hd-video-conferencing-resources/documents)

For more tips and insights - visit our [blog!](#)



Our online service for better collaboration

**Get your free trial version:**

**0800 011 2120**

[www.gotomeeting.co.uk](http://www.gotomeeting.co.uk)



**North America**  
Citrix Systems, Inc.  
7414 Hollister Avenue  
Goleta, CA 93117  
USA  
Tel. +1 805 690 6400  
[info@citrixonline.com](mailto:info@citrixonline.com)

**Europe, Middle East & Africa**  
Citrix Systems UK Limited  
Building 3  
Chalfont Park  
Gerrards Cross  
SL9 0DZ  
United Kingdom  
Tel. +44 (0) 800 011 2120  
[europa@citrixonline.com](mailto:europa@citrixonline.com)

**Asia Pacific**  
Citrix Systems Asia Pacific Pty. Ltd  
Level 5  
66 Waterloo Road  
Macquarie Park NSW 2113  
Australia  
+61 2 8870 0800  
[asiapac@citrixonline.com](mailto:asiapac@citrixonline.com)

## About Citrix

Citrix (NASDAQ:CTXS) is leading the transition to software-defining the workplace, uniting virtualization, mobility management, networking and SaaS solutions to enable new ways for businesses and people to work better. Citrix solutions power business mobility through secure, mobile workspaces that provide people with instant access to apps, desktops, data and communications on any device, over any network and cloud. With annual revenue in 2014 of \$3.14 billion, Citrix solutions are in use at more than 330,000 organizations and by over 100 million users globally. Learn more at [www.citrix.com](http://www.citrix.com).

© 2015 Citrix Systems, Inc. All rights reserved. [List all Citrix Trademarks appearing in the specific piece] are trademarks of Citrix Systems, Inc. and/or one or more of its subsidiaries, and may be registered in the U.S. Patent and Trademark Office, with the Office of Harmonization for the Internal Market, and in other jurisdictions. All other marks appearing in this piece are the property of their respective owner/s. 698AU\_WP/2016-06-20