Millennials at work

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In the last several years, I have had the privilege of working with the brightest of our next generation of sales producers. According to Forbes BrandVoice, Millennials (aka "Gen Y" or "Yers"), ages 21 to 37, will comprise more than one of three adult Americans by 2020 and 75% of the workforce by 2025. Here are some of the top characteristics of this group that I have identified:

- Respect for authority
- A propensity to schedule everything
- Assertive with strong views
- Performs tasks fast and immediately
- Most comfortable in a relaxed work environment
- Desire for face-to-face contact
- Seek immediate approval

In my sales training programs, I generally take the lead when working with new reps during the first set of field day calls. My experience with Millennials, however, has led me to rethink this approach.

I recently joined a Gen Year who was trying to negotiate a new contract as a result of our series of initial calls. The purchasing director was close to my age, so it seemed natural for me to take the lead. The call went well and I felt quite satisfied with the customer's willingness to move forward with a new agreement.

As we were debriefing the meeting in the car, however, the young rep expressed his disappointment that I didn't let him lead. Subsequently, I let him spearhead a future meeting and found that his early developing skills were exceptional! Having done all his homework in preparation for the call, he commanded authority and I learned a Millennial lesson.

As a sales trainer I teach 10 core organizational tools, which "best in class" apprentices either adopt or modify to service their goals. These include:

1. Weekly call reports
2. Setting calendar appointments
3. A looking back/looking forward monthly report
4. Monthly travel days
5. Sales results
6. Dashboard
7. In The Funnel accounts (ITF)
8. Top five opportunities
9. Assessments
10. Customer Value Files (CFV)

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In my experience, Gen Y both appreciates and grasps these applications with eagerness. Here are some of the ways you can expand on these tools with your young sales team, to promote even more effective selling:

- Weekly call reports – Fundamental to any professional sales portfolio is the need to track activity with each customer. Tracking should include: (1) an account numbering system to collect all activity on each account; (2) an account name; (3) a goal (noun); (4) a next step activity (verb); (5) a date with an appointment on your calendar. These reports should be required and completed by the end-of-work on Friday and the sales manager should review them with each rep promptly. I read my team's reports on Friday night and respond to any requests for support with an email to the responsible department head, copying the rep. I find Millennials respond to text and emails any time of the day or night so this system works well for them.
- Setting calendar appointments – If appointments are made and confirmed in advance, a "no show" call (any excuse when the customer won't see you) should only happen with prospective contacts. To ensure my reps are looking and booking ahead, I require the next month's calendar when an expense report is submitted. I have found that Millennials have very few "no shows." With their propensity to schedule everything, Yers tend to set a next calendar appointment with a customer before leaving a call.
- Looking Back/Looking Forward Monthly reporting (LBLF) – The LBLF tool, due by the close of the last day of business each month, is a summary of the past and next month's activity. Included is: (1) closed business; (2) significant projects/events; (3) a summary of dashboard numbers; (4) Top 5 ITF accounts (goal, next step, date); (5) the name of next month's Customer Value File (CVF) presentation. Generation Y reps respond well to this programmed activity because they like immediate feedback.
- Customer Value Files – A CVF is a customer appraisal form used to review sales and activity history and set expectation for the next 12 months. It ensures the supplier/client relationship is progressing effectively. It appeals to the Millennials desire to maintain face-to-face contact and receive immediate approval.

These and the other tools support the next "great generation's" desire for superior achievement, while operating at record-breaking processing speed. I get much satisfaction knowing I am training this group of high achievers who so passionately embrace my favorite motto: "It's difficult to delight your customer if you feel disorganized at any level."

ABOUT THE AUTHOR

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