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The Next Action System

# GET SALES DONE

*An easy framework  
for closing more sales*



**Michael FitzGerald**

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# The Next Action sales method

Next Action sales methodology, developed exclusively for OnePageCRM, was inspired by a GTD technique (Getting Things Done by David Allen). Same way as GTD increases productivity and improves time management when the Next Action is applied to sales it's a powerful tool to make you and your team focus exclusively on sales.

By encouraging upfront decision making and applying the Next Action to each of your leads and customers, you are ensuring that you will never miss any opportunity to sell.

The Next Action sales method involves a number of elements, namely: The diary, The strikethrough, The next action, The locked-in loop, The note and The nudge. But to keep the administration to a minimum and the selling at a maximum, the system is designed to be easily implemented and simple to maintain.



The diary



The strikethrough



The next action



The locked loop



The note



The nudge

The secret to sales is not charts and graphs, it is completing sales actions. The Next Action sales method focuses you and your sales team 100% on taking action.

“The Next Action Sales once applied within any sales system will help to minimise slippage and maximise deals.” - Paul O'Connor



# 1. The diary

Paul once worked with a publishing company and sometimes got chatting with the very nice guy who was in charge of credit control. He explained over lunch one day what made him good at his job. It wasn't rocket science and it didn't require getting 'heavy' with 'reluctant clients'. "It's the diary", he said.

He would have a large diary open in front of him at all times on the desk and in it he'd note everything a client who owed money would say during his conversations with them. He'd also forward-note all the future actions to be taken, having agreed with the client that by a certain time a particular piece of the jigsaw would be in place that would bring the picture (payment) closer to completion.



Come that day and time in his diary, he would duly come across the reminder, ring the client back and based on his notes, he was able to deal with what was said, to judge the truth of the client's latest situation and respond accordingly. He proved that methodically working away at the barriers with proper information was far more effective in getting an account paid up than threats and accusations. He was old fashioned in the tools he used but fully on top of his job.

The systematic approach we are proposing here is doable with just pen and diary. It's that simple. Once you have the diary, the next element is the strikethrough.

## 2. The strikethrough

You open your diary for today and there's a number of sales actions written down there in a list form.

You pick one.

- Call Jo about project estimate.

You do it.

You are pleased with yourself. You put a satisfying line through the item.

~~- Call Jo about project estimate.~~

You are on a roll so you move onto another item on the list.

Nuh-uh. That's your problem, right there.

**The Next Action method says:**

"Sorry, you are not allowed to move onto the next item until you have set a NEXT ACTION for Jo."

# 3. The next action

It nearly goes without saying that the next action is not just shoved onto to the list of sales actions you have in front of you. The list would just get messy and off-putting.

The key to setting the next action is to front-load it; make the decision now while you have the fullest perspective on the situation and it is clearest in your mind. This will improve the quality of future actions, making them easier and more automatic to execute when the time comes.

Let's say you told Jo you'd come up with new pricing for a smaller order and would email her the new estimate. Assuming this wouldn't take long, you'd do this there and then, so what would be your next action? It would be;

 Ring Jo for decision on pricing

And when would that be scheduled? The answer would depend on your sense of how busy Jo is, how important the matter is to her and ultimately how quickly she would get time to review your email, consult with colleagues, make a decision etc. Let's say two days.

That next action is added to your list for two days time and written into your diary on that future day accordingly.

This front-loading of actions is the key to the efficiency and momentum in Next Action sales.

The beauty of the system is that you can then forget about that action for the time being, making room in your mind for other tasks. Then, lo and behold two days later in your diary you see the instruction, "Ring Jo for decision on pricing ", at the top of your action list. And you do.



## **Mind your language**

**Next actions should be constructed in very simple and direct language:**

- Start with an action verb – call, email, meet, schedule etc. – something that will trigger the necessary action
- Be clear about what needs to be done and for whom
- Keep it to just a few words so that it's quick to read when its time comes round



Every action has an equally important next action.

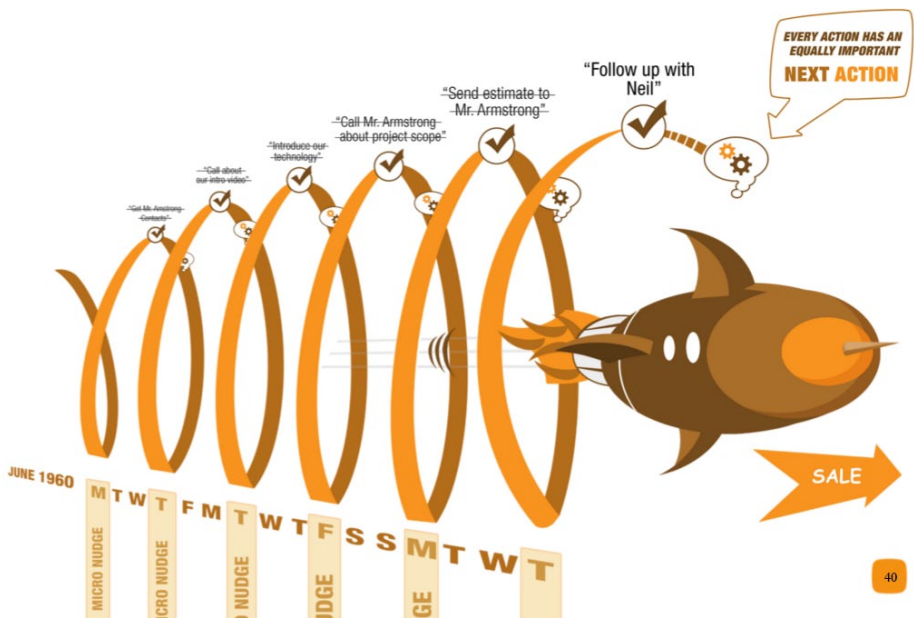


## 4. The locked loop

All your next actions are locked into a system, moving around in proactive cycles; disappearing from view when not relevant, reappearing when the time is right... locked in a loop of sales actions.

They can't get out of that loop until either a sale is made or the contact is put on hold (or deleted).

Let's see the locked loop in action.



More often than not the person/company you're dealing with won't just say O.K. after one or two interactions. So how do you respond? Do you give up? Do you hassle them? Do you demand that they purchase or else...?

No, of course not. You remain calm and consider all the facts. Even when a sales lead is followed up at the right time, the follow-up can still fail because of a failure to follow up in the right way. You do need to keep up the momentum but you need to do so smartly, with the right information at your disposal. Information is the key to unlocking a person's situation. Consider it to be a riddle or a mystery. Challenge yourself to solve it.

What do you need to make sure you have all the necessary information available to you at the follow-up stage? Notes are the answer.

# 5. The note

So, as well as dates for next actions, we also need to keep notes on our communications with people and our thoughts on their circumstances – the relevant information supplied by or deduced from the person.

## Notes on notes

- Notes should be linked to each customer or deal and where necessary each action.
- Notes should provide just enough detail to enable you to make the right move.
- Notes might cover things like what the person said on each occasion they were contacted, what you replied, what tone was used by the person, what hints they might have given in various ways about the issues that need to be resolved before they can proceed with a purchase.

## Notes should be brief & to the point

- However, the notes should be as brief and to the point as possible - the essence of what was said rather than a transcript.
- Crucially, they should be easily scanned at the next action stage, otherwise the risk is that they'll be ignored and mistakes will ensue.

## Notes for collaborative sales in teams

Notes are even more important when the sales are being done by a team rather than just one individual. For a colleague to be able to take up where you left off, the notes and next actions need to be comprehensive, clear and concise.

Your colleagues will need to have all the information there is on the person/company you've been selling to.

They will need to understand the instruction and background perfectly.

They won't want to have to sift through layers and layers of detail and padding.

These notes and observations will help you decide on how best to nudge the situation along, ever closer to a sale.



Nudges are your reactions to those “no’s”, based on your sense of what might be causing the resistance. They don’t hate you, as Godin says, they just need everything to line up for them to be able to proceed with you.

## 6. The nudge

It is helpful to visualise these next actions that are based on the particular needs and circumstances of the person you're dealing with as nudges. A nudge gives the sense of moving things forward that is so important in sales but without being too pushy.

Engaging directly with the particular customer and building a strong relationship with them, these nudges could involve anything from:

- being patient with them, to
- helping them “sell” it to colleagues/bosses, to
- an adjustment in price, to
- a small change in what is being offered, to
- a reassuring face-to-face meeting

Whatever the customer requires to be encouraged upwards to the top floor of your building or as they say, over the line.

Seth Godin has an interesting take on customers' reluctance to say “yes”. He writes:

### What “no” means:

- I'm too busy
- I don't trust you
- This isn't on my list
- My boss won't let me
- I'm afraid of moving this forward
- I'm not the person you think I am
- I don't have the resources you think I do
- I'm not the kind of person that does things like this
- I don't want to open the door to a long-term engagement
- Thinking about this will cause me to think about other things I just don't want to deal with



### What it doesn't mean:

I see the world the way you do, I've carefully considered every element of this proposal and understand it as well as you do and I hate it and I hate you.

# Wrapup

So, there it is; our systematic approach to sales based on setting next actions, performing them in a timely and well-informed manner, moving the situation forward with a series of nudges, until hopefully agreeing a deal.

The problem is that even with the system in place and even if you are a triple-A salesperson, human nature being what it is, you will be sure to drop the ball from time to time and more than likely will need further help to ensure every lead is captured properly, every prospect is handled properly and every deal is done that can be done.

This is true of one-person sales operations but even more true of sales teams. In a team situation, the volume of information is multiplied and the complexity of managing it is exponential. Neither pen and paper nor even basic databases will cope for long with bigger or scaling-up operations.

This is why we built OnePageCRM to help sales teams succeed and grow.

## The Anatomy of your Action Stream

A dynamic list of contacts with their next action, sorted by date

### Next Action workflow

Based on a simple dashboard, prospects float to the top when action is required.

[Learn More...](#)



### How it's sorted

Contacts are sorted by priority and date.

ASAP & Overdue actions are displayed on the top of your Action Stream highlighted in red, followed by Today's in orange and then Upcoming actions in grey. [Learn More...](#)



ACTION STREAM		CONTACTS	Search
<input type="checkbox"/>	Refresh		
<input type="checkbox"/>	★	Jane Power HomeWare Hevin	ASAP Follow up with intr
<input type="checkbox"/>	★	Paul Byrne Patterson Media	DEC 8 Follow up with Pat
<input type="checkbox"/>	★	Joe Bloggs Big Company LLC	TODAY Call Joe re pricing
<input type="checkbox"/>	★	Texas Instruments Tony Kinsley	TODAY Call Tony to make
<input type="checkbox"/>	★	Archimedes Tools Inc. Jane Doe	TODAY Email Jane with se
<input type="checkbox"/>	★	Solar Fitting Ltd Ed Billings	DEC 18 Do tech demo for J
<input type="checkbox"/>	★	Victoria Grant Little Steps Ltd.	DEC 18 13:35 Forward the
<input type="checkbox"/>	★	Tony Monero Home Suppliers Ltd	WAITING Call Tony to keep
<input type="checkbox"/>	★	Acme Inc Jane Doe	WAITING Has Jane respon
<input type="checkbox"/>	★	Sunnydale Systems Edmund Roe	WAITING Call Edmund to s

### Sync to calendar

Connect your Action Stream to your preferred calendar to view your daily tasks. [Learn More...](#)



### Notifications

Morning email  
Kick start your day with a summary of your sales actions sent to you via email every morning.

### Time in Next Action

Set a specific time for a Next Action and get a notification at that time. [Learn More...](#)

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# Author

Michael FitzGerald is CEO and founder of OnePageCRM. A Design Engineer by trade and inventor by nature, his career has taken him from designing Olympic athlete test equipment to the development of consumer products for multinational companies. Michael's strength is in creating concepts to give the ultimate user experience. Michael has grown OnePageCRM to over 6500 customers across the world.

