

Manufacturers Representatives Educational Research Foundation

The Field Visit Guidelines

Visit each sales territory at least once each year. Clearly define the objectives of the visit and the benefits that accrue as a result of your presence in this territory.

Give adequate lead-time to the sales organization prior to the visit. 30 days is common or a lead-time that is agreed upon with the agency. Avoid conflicts with the existing business and personal schedules of those you wish to visit.

Plan the visit - Working with your field sales organization's input; determine the accounts to call on, a specific objective for each call, and how you can help meet the customer's needs. Document the plan and share it with the agency to be visited prior to the visit.

Be prepared - do your homework on the sales organization, problems and issues with customers, sales in the territory, key accounts, and potential new business opportunities.

Ensure everyone traveling with you understands the role of the sales firm in the territory. Also ensure they understand their own role with each account being called upon.

Who should pay? Typical guidelines are: Pay for half the meals when no customers are present. Pay for all expenses involving customers.

Be patient if it's necessary for your representative to handle some other principal's business while you're there. Remember, making sure the customer's needs are met improves the relationship and increases sales for everyone. (Plus, you would expect this if you were the other principal)

Follow-up promptly and copy your field sales firm on all correspondence resulting from your visit. Always 'DO what you tell the customer you are going to do' WHEN you tell the customer you are going to do it.

Be appreciative of the time and effort your host has provided during your visit to make it worthwhile.

Topics not to discuss:

Sex, Politics, Religion

Problems with other field sales firms

Salaries

Problems within your company

Issues with the agency (Don't use an agency's salespeople to find out if there are problems inside the firm.)

Provide a critique of your visit, indicating the positives, negatives, and ways to make the next visit more productive.

Passport Into the Territory

Territory visits are a very important element in the working relationship between the field sales firm and the manufacturer. Done well, with purpose and planning, territory visits from sales management and/or factory personnel can increase sales and market share. Done poorly, with questionable purpose and no planning, a visit can damage not only the relationship between the field sales firm and the manufacturer, but do harm to the customer relationship as well. Following the passport action steps will insure a productive and well planned territory visit.

1. Arrange the trip well in advance:

Give at least 30 days notice prior to coming into the territory.

Have a business purpose for the visit. (Just because there is great snow in the Rockies is not a reason to visit the Colorado territory)

Write a pre visit letter (e-mail or fax) that states the goals and objectives for the visit.

2. Pre visit information:

Analyze the business being done in the territory prior to the visit.

Review any service or product issues with customers in the territory

Review the status of business development and marketing plans for the territory

3. Plan the visit

Contact the firm's senior management to discuss the visit.

Jointly establish a list of customers for joint calls and goals for each call. Then research the products, history, potential and key decision makers for those customers.

Jointly establish the final goals and objectives for the visit.

Discuss strategies for good calls

Determine any training that can be covered during the visit.

Confirm all dates.

4. Itinerary

Itinerary should include:

Who will pick up at the airport

Ground transportation arrangements

Lodging

Time schedule for each day (be sure to ask for some office/phone time if needed)

Joint call customer list (with dates and times of appointments)

Training schedule

Entertainment requirements with customers (when, where, who)

After hours plans

Make sure itinerary is distributed to sales firm staff and all visitors prior to coming to the territory. (Detailed itinerary should be planned by the sales firm being visited, if they don't provide one, ask for it)

5. Murphy's Law - Handling problems

Discuss and have a plan to handle problems

Calls that run too long

Last minute changes

No Shows

Scheduling too much

Incompetence

6. Joint Calls

Have a plan for each call

What is your role for each call

Make sure you know what NOT to say

Make sure you have all necessary materials, samples, etc. with you for the call and who is responsible for bringing them to the call.

Make sure you know what level of authority you have in negotiations with the customer

Don't promise what you can't deliver

Follow-up, Follow-up, Follow-up (DO WHAT YOU SAY YOU WILL DO)

7. Review Call

Post call review

Establish action items and who is responsible

Make sure follow-up responsibilities are clearly understood

Critique call - what was good, bad and ugly

Establish strategies for future contact with the customer

8. Visit Review

Review entire visit with agency management before leaving territory if possible, otherwise write or email a report to agency management within 10 days of the visit.

Monitor progress on action items and follow-up responsibilities. (Always 'DO what you tell the customer you are going to do' WHEN you tell the customer you are going to do it.)

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