
Making Field Sales Calls Work For Both Sides



When a group of independent manufacturers' representatives was engaged in a conversation on the subject of wasteful practices they're forced to engage in, with one voice they agreed that unplanned or poorly planned joint sales calls — with either principals or distributors — were a huge time waster.

As a follow-up to this conversation, *Agency Sales* contacted a number of manufacturers' representatives to get a feel for whether that initial conversation was an aberration or if joint field visits were something they'd rather avoid. While hardly a scientific study, what we found was that reps:

- Look forward to and appreciate well-planned and executed calls on customers with their principals.
- View such calls as opportunities to enhance their relationships with both customers and principals.
- Would rather avoid any visit that's put together at the last moment with no clear purpose in mind.
- Don't necessarily want such joint calls to serve as in-the-field training for new principal personnel.

When he's contacted by a principal for the purpose of participating in a joint customer call, the first question Bob Gerrard asks is, "What's it for? What are we trying to accomplish here?"

Gerrard, Gerrard & Associates, Mooresville, North Carolina, maintains, "For the call to be truly beneficial, there has to be a clear purpose and agenda. Otherwise, all we're going to be

doing together is traveling over the countryside accomplishing very little. To ensure that there is a purpose, I'd maintain that we've got to devote time before the call for planning the discussions we're going to have with the customer."

Gerrard maintains that his principals are pretty reliable in this regard. "The joint calls I make with them work because such calls have always been a part of our strategic planning and they've always been clear on why they want to visit. Generally they're here in pursuit of a specific job. I'd have to say that any rep would be eager for them to visit the territory for that purpose."

Rep as the Local Presence

Speak with Milton Fore on the same subject and you'll learn in a hurry that Gerrard is hardly alone in his views. "Since we're the manufacturer's local presence in the territory, what we're looking for when it comes to a field visit is someone who is supportive of our efforts with customers — someone who reinforces our legitimacy in front of them. Hopefully the factory person brings some technical and commercial expertise that adds value to the sales calls. On the other hand,

"For the call to be truly beneficial, there has to be a clear purpose and agenda."



Bob Gerrard

what we don't want is someone who is trying to refer customers to another rep or another buying source, or to undercut what we've spent so much time working on."

Something else the rep doesn't especially enjoy doing on such calls is training the ever-changing personnel from the manufacturer. "We get frustrated with the constant turnover of regional managers. Before we know it, there's another fresh face sent out into the field for us to train. Sometimes it looks like they just send people to keep them out of the factory and out of trouble. We wind up babysitting for them."

Fore, Flow-Quip, Inc., Tulsa, Oklahoma, continues that to ensure a positive result for a joint field call, "We usually have a little pre-call meeting. This allows us to coordinate our efforts with the

"Since we're the manufacturer's local presence in the territory, what we're looking for when it comes to a field visit is someone who is supportive of our efforts with customers."



Lou Basta



Bob Johnson



Steve Gallagher

What Manufacturers Are Saying

Concurrent with the preparation of this article, a NEMRA communication committee has been exploring the issue of rep-principal joint field calls. MANA member John Gunn, GCA, Tampa, Florida, who also serves on that committee for NEMRA, provided us with the results of a poll that was taken of manufacturer regional managers concerning their views of these joint calls.

The manufacturer personnel were polled to learn what impresses them (or for that matter, what depresses them) when working with a rep in the field. Below are some of their comments:

- A good trip starts with a clean car and a well-groomed salesman.
- Be a Boy Scout . . . have an account summary prepared and available with an outline of problems and opportunities.
- Provide names and titles of the people you will be seeing prior to travel date.
- A good rep should know his customer's customer.
- Know your local competition and their competitive lines.
- Promotional material, samples, catalogs and flyers should be in the trunk.
- Follow-up items should be designated as to who is to do what and by when.

Most said the above happens less than 50 percent of the time. Unbelievable!



John Gunn

principal so we're all on the same page. After all, what's the object of the call if we're not truly working together?"

In fairness, however, Fore emphasizes that the majority of the personnel that their principals send out to work with them are fairly well informed about the product and customers and the issues facing the customers. "At the same time, they appreciate the fact that we have other lines to represent, and they allow us to do what we have to do during our calls."

Plan with a Purpose

Equally appreciative of well-planned-for-a-purpose sales calls is Lou Basta, Design Metals, Old Chatham, New York. According to Basta, "I don't really remember any joint calls on customers that weren't productive. For instance, just yesterday the vice president of sales for one of my principals accompanied me to one of my major accounts. The visit developed when there were some changes at the account. My previous long-term contact left and my principal accompanied me to firm up the new contact. While that was a special one-day one-

“To ensure that his time, my time and all of my customer’s time is well spent, I’ll work out a detailed itinerary well in advance.”

“Basically, what’s it’s all about is working together with the principal as a unit, helping each other with the goal of assisting the customer.”

“We come up with a complete visit itinerary and fax it to the regional manager prior to his visit.”

time call, there are others that occur when the principal wants to spend two or three days with you in the field. To ensure that his time, my time and all of my customers’ time is well spent, I’ll work out a detailed itinerary well in advance.”

He adds that with the latter, there often isn’t a pressing need for the visit to the field; rather, it’s geared more for solidifying the rep’s presence in front of the customer. “Who knows how it works out? Often, I’ll walk away with added business as a result.”

Working as a Team

The team approach to joint sales calls is what Bob Johnson, CPMR, The Growth Partnership Company, Green Village, New Jersey, appreciates the most.

According to Johnson, “Basically, what’s it’s all about is working together with the principal as a unit, helping each other with the goal of assisting the customer.”

That means that when a joint visit takes place, each works to support the efforts of the other. “Ahead of time, however, they should plan how to better service the account. That means both

parties must let the other know what information they have concerning the customer and what they hope to achieve in the course of the visit.” Johnson used the image of the principal and rep going in on the call almost holding hands in an effort to show their unified presence in front of the customer. One way that unity is shown, according to the rep, is by each being professionally prepared. “Be ready to take notes, be attentive, know the details of the job and the specifics of the customers’ needs. That’s how you can work best together.”

Investing the Time to Make it Work

And finally, there’s Steve Gallagher, CPMR, Synergy Electrical Sales, Inc., Fairless Hills, Pennsylvania, who really isn’t into spontaneous field visits. To ensure the type of teamwork that Johnson advocates, Gallagher, who is in the midst of his term as chairman of the National Electrical Manufacturers’ Representatives Association (NEMRA), also likes to plan ahead. “Here’s what I’m referring to when I mention advance planning,” he said. “Here

I am on a business trip that will take me through the rest of the week and I get an e-mail from a regional manager telling me he wants to work with one of my customers next week. There’s not an awful lot I can do with that type of short time. I’m asking myself ‘Where did this need come from — out of left field?’ If he truly wants a quality day, he’s got to build in some time to make it worthwhile.”

When he’s given enough time, here’s what Gallagher usually does: “We come up with a complete visit itinerary and fax it to the regional manager prior to his visit. It’s a very thorough document. We’ll include everything from:

- The time he arrives at the airport.
- Whether he needs to be picked up.
- His preference for the hotel he stays in.
- Does he have to meet with inside/outside sales staff?
- What customers does he want to meet with?
- A complete list of his objectives for the visit.

“If the regional manager doesn’t go over the form and sign off on it, he really can’t expect us

to meet him at the airport. It's happened that he hasn't gotten back to us until the 11th hour, and by then we've already gone ahead and planned any number of activities. We do this because our regional managers are very important to us, their time is important to us and we don't want to waste it."

Gallagher continues that all of this is "geared to make our time together as productive as possible. This is just something we do. We look upon it as one of our best practices."

As an example of how this ap-

proach works for him and his principals, Gallagher described his recent experience with one of his lines. "We sent the regional manager the itinerary, and not only did he go over it and sign off, he added to the information. He came back to us with the most thorough summary analysis of each call. It included information on our calls to date, sales to each customer and other specifics that were important to the visit."

He added that this approach reflects "our and the regional manager's purpose in spending time together. It turned out to be

much more than just having him come in, shake hands and see how we're doing."

Gallagher concluded that field visits conducted in this manner, coupled with the regular communication the agency provides to principals, "should go a long way toward eliminating the need to report back to the principal. The regional manager is able to see and experience exactly what we're doing in the field. That, together with our phone calls and other communication, is more than enough to keep them in the loop." □

Copyright © 2007, Manufacturers' Agents National Association

One Spectrum Pointe, Suite 150, Lake Forest, CA 92630-2283 • Phone: (949) 859-4040 • Toll-free: (877) 626-2776 • Fax: (949) 855-2973
E-mail: MANA@MANAonline.org • Web site: www.MANAonline.org • All rights reserved. Reproduction without permission is strictly prohibited.