

A photograph of three business professionals in a meeting. In the foreground, a woman with blonde hair is smiling. Behind her, a man with grey hair is looking forward with a neutral expression. To the right, another man with dark hair is smiling. They are all wearing business attire.

HOW TO PLAN AND EXECUTE EFFECTIVE
SALES MEETINGS

(from both the rep + principal's perspective)

REPRINTED FROM

agency sales[®] magazine

august 2009 · vol.39, no.08

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The key to a successful rep-manufacturer sales meeting resides in the effective planning of the event. **It's only when both the rep and the manufacturer focus on what's going to transpire before, during and after the event that they will reap the benefits of a productive meeting.**

PLANNING MAKES PERFECT

Whilst that's the consensus that evolved after several interviews, the fact remains that planning and executing a successful sales meeting can be easier said than done. For instance, consider what some reps have to say on the subject:

Meeting with a purpose. "There's no sense in having a meeting just to have a meeting," maintains **Adam Cooler, CPMR, J.W. Cooler Company**, Austell, Georgia. According to Cooler, a bona fide purpose for a meeting includes meeting a new sales manager, a new product introduction, product/application training or an introduction to an innovative marketing program. These are all more than valid reasons to get together with a principal.

"Then there's the opportunity to take a close look at a customer or market that we haven't been focusing on. These all work as valid incentives to get us out of our territory for a new or fresh look at things."

Easy on the complaints. "One thing the rep really doesn't want to hear are complaints that we're not completing enough calls on certain customers or not getting enough orders," says **Peter Kennedy, Kennedy Industrial Sales, LLC**, Fairfield, Connecticut. "There has to be a productive reason for a meeting. It shouldn't just be an opportunity to tell us what we're doing wrong."

Learning from and meeting with key personnel. "Over the years I've seen the number of sales meetings drop between reps and their principals," explains Tom Gallagher, Teeling & Gallagher, Indianapolis, Indiana. "Maybe it's the expense involved or it's just not as easy to do, but business has changed," he said. "Where once there might have been a special event with a lot of entertainment, now I just don't see it anymore."

"A couple of things I always looked forward to, however, were to meet with key manufacturer personnel and to network with my fellow reps who worked on the same lines."

Speaking to both points, Gallagher continued, "I continue to be surprised by the number of reps who don't truly understand what their principals manufacture. Take something as

simple as a spring. There are springs used in watches and springs used in railroad cars. Knowledge of the difference isn't something you're born with. That's where regularly getting together with your principal can help. You learn more about what they're doing in a very short period of time."

At the same time, Gallagher also points to relationships he's established with rep peers as a side benefit of principal sales meetings. "Even if I didn't get much positive out of the meeting, I've always benefited from meeting with fellow reps. When you meet in such an environment you always come away learning something, solving a problem or making a contact that lasts for your entire career."

THE BEFORE, DURING AND AFTER

If these reps speak with one voice about the importance of coming away with something positive from a sales meeting, consultants who have spent time planning, attending and even running sales meetings for reps and manufacturers maintain success is all in the planning. And the planning they refer to focuses primarily on what transpires before, during and after a sales meeting.

Paul Pease, The Pease Group, Hermosa Beach, California, emphasizes that prior to any sales meeting there should always be "a clear agenda complete with objectives, participants, format and any necessary pre-meeting work that needs to be accomplished by the accountable parties."

Just as the reps already quoted here, the consultant maintains that to be successful a manufacturer sales meeting must be about something substantial. Included in his list of substantial subject matter are:

- ✦ New product introductions.
- ✦ New business system improvements.
- ✦ "Any 'fixes' on products or systems to improve productivity."
- ✦ The opportunity to learn from other reps as to how to sell certain products to certain customers.
- ✦ The opportunity to learn from other reps "how to operate their agencies better (through networking conversations during breaks, lunch and dinners."

“THERE’S NO SENSE IN HAVING A MEETING JUST TO HAVE A MEETING.”

- ✦ The ability to “create a sense of camaraderie among reps and factory personnel through interactive activities.”
- ✦ Rep council meetings and reports — if applicable.
- ✦ An awards’ dinner/ceremony complete with recognition of rep of the year, top-performing rep and most improved or greatest sales increase among reps.

CREATING THE BEST IMPRESSION

Pease continues with a few strong opinions concerning what has to be present during the actual sales meeting in order for it to have the best chance for success. “If the manufacturer can prepare and execute a well-run meeting, that very fact sends a much more tangible message to the rep than any memo could ever generate.” He continues that integral to the well-run meeting are the details. “You’ve got to be right on the mark with everything you do. That means your announcements and invitations have to be sent out in a timely manner. Then you’ve got to consider such things as the agenda, are spouses included, who picks up whom at the airport, hotel arrangements, a welcome package in the room and local activities. It’s really all about crossing the t’s and dotting the i’s.

“And you’re not done yet. What about the actual conduct of the meeting? Pay close attention to your presenters. Ensure that they arrive on time and are well prepared. Have personnel positioned to move attendees from one location to another if called for.”

Once the physical meeting concludes, the important work isn’t done. “If results are to flow from a sales meeting, there’s got to be a follow-up plan. Communicate to attendees what happened, what was learned and who is accountable for what action items and set a date for when those action items are to be completed.”

Speaking for a moment about anything that could doom a sales meeting from the start, Pease notes that “An overemphasis on numbers coupled with poor presentations and execution will send everyone away disappointed. There’s nothing worse than boring speeches and PowerPoint presentations devoted to company policy or organizational charts.”

He also cautions against having meetings that last too long. “Be careful about any meeting that begins on a Monday,

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Tuesday or Wednesday morning and lasts more than two days, except if you're leading into some sort of a fun-activity weekend."

As he looks back on a number of the sales meetings he's participated in, Pease recalls one typical high-value meeting where, "We began with a welcome cocktail reception on a Wednesday night. Following that, the next day, programs were broken up into one- to two-hour presentations with plenty of interactivity. Thursday night we got together for dinner (including spouses) with the regional manager. Friday, we met until noon and then went on to one of three pre-selected activities whether it was golf, ocean fishing or sailing. Friday night we had the typical awards ceremony followed by pre-planned tourist activities on Saturday.

"Bottom line, the meetings I recall are the ones that presented real value to me as a rep — and isn't that the real purpose for what we're speaking about here? All reps want is valuable information that they can use. At the same time the manufacturer is looking to achieve mind-share with their reps. Plan and execute the meeting properly and everyone wins."

STARTING WITH THE AGENDA

Pease is hardly alone with his thoughts on what makes for an effective sales meeting. **Nicki Weiss** maintains that there are some obvious facets of the meeting that the rep and the manufacturer should work on together.

Weiss, **SalesWise**, Toronto, Canada (www.saleswise.ca), a certified professional coach, master trainer and workshop leader, says that an obvious place to start together is with the agenda. "What can happen is that one side or the other creates the agenda and then once the meeting starts, the other side might say, 'Uh oh, this isn't what I wanted to speak about.'

"When it comes to the agenda, I don't think the manufacturer is necessarily in the driver's seat. If the rep and the manufacturer are truly in a partnership, they should work together on developing subject matter. If done, that shows

that they've both got a vested interest in planning an effective meeting and in addressing subjects of mutual interest. If they work on the meeting together, the chances for success increase dramatically."

"Engagement" is a word used often by the consultant when she describes how the meeting should actually be conducted. "When there's no engagement between rep and manufacturer, then there's no interaction. In order to achieve an effective level of engagement, individuals can't be thin-skinned. Be open to opinions and comments from all corners."

She continues with the thought, "I really believe what makes or breaks meetings is the designing of your rules of engagement. You ought to have rules on how to proceed whether you're planning an annual meeting or your meetings take place 10 times each year. Having said that, the person who is planning the meeting has to be willing to work with a group of people and allow them to develop their own rules of engagement. Their approach ought to be something along the lines of, 'If we are going to plan a knock-it-out-of-the-park meeting, what would it look like? Moving on from there, you're planning should include answers to questions such as:

- ✦ What happens if you get into a conversation that makes people uncomfortable? How are we going to proceed?
- ✦ What would make it safe to say something uncomfortable?
- ✦ What should our rules be regarding the use of technology (cell phones, BlackBerrys, etc.) during the meeting?

"Remember, if the rules come from the front of the room, those rules will be viewed as a directive. If your rules emanate from the group, however, the entire group puts pressure on individuals to proceed by the agreed-upon rules."

PRAISE FOR A FACILITATOR

In order to achieve much of what she's professing, Weiss is a believer in the use of a meeting facilitator. "Using an outside, objective, somewhat disinterested facilitator is a great way to

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move forward,” she says. “Too many people don’t use facilitators. I don’t know why, maybe it’s the money involved or they feel they lose control. At the same time, if conversations veer off course, the right facilitator is adept at getting it back on the mark. But whatever the cost or perceived lack of control, it’s less than the cost involved with conducting a poor meeting.”

Asked what can doom a sales meeting or conversely provide the best chance for success, Weiss says that participants can walk away with a negative impression if “there’s no sense of engagement and there are too many agenda items.” She emphasized that a facilitator can be of assistance with both of these issues.

On the other side, she continues, “Participants will walk away with a positive feeling if there’s been a sense of engagement and they’ve had some fun during the course of the meeting. There’s nothing wrong with having fun at these meetings, and an effort should be made to ensure that we don’t take ourselves too seriously.”

AGREEMENT AMONG PARTIES

A third consultant weighing in on the sales meeting process is consultant and business coach **Jay Henderson**. Henderson says that successful meetings he’s been associated with are those “that feature an open format where both parties are looking for a useful and valuable education.”

A professional business coach since 1995, Henderson is the founder of North Carolina-based **MyRepCoach** (www.myrepcoach.com). He coaches clients on executive leadership management, hiring and motivation, traditional and Internet marketing, competitive sales strategies and high-leverage alliances for fast-growing sales companies and entrepreneurial businesses. Clients include manufacturers’ rep firms and their sales teams.

Henderson says that achieving that goal of education can only occur when the agreed-upon agenda is clear up front about the priorities. “What always happens with human dy-

namics is that each side (in this case, rep and manufacturer) has their priority. If one dominates when it comes to establishing the agenda, problems result.”

That’s why Henderson, just as Pease and Weiss, maintains the agenda has to be jointly agreed upon by both sides well in advance of the meeting. “This will allow both the rep and the manufacturer to keep their focus clearly on the ultimate goal of the meeting—which is to drive revenue. When we drive revenue, then everyone wins. That’s the bottom line as to why we’re having this meeting in the first place.”

If the agenda has been agreed upon, then there must be a feeling of openness about the meeting. Henderson maintains that individuals from either side can hardly be thin-skinned. “Consider the manufacturer who has come out with a new product. If the rep offers some real-world input about the product, the manufacturer can’t react as if they’re attacking ‘my baby.’ He’s got to realize that they’re the experts, they’re out in the field and they’re letting him know what they encounter. They’re trying to help him drive revenue.”

One serious cautionary note that Henderson sounds concerning post-meeting activity concerns the support the manufacturer should provide to the rep. “There’s nothing worse than to have your reps come in and get pumped up concerning a new product or program, and then there’s nothing there to support them — no samples, literature, advertising, competitive analysis, or delivery information.”

And finally he notes that just as some of the reps maintain in this article that “There’s no purpose in telling the rep how to do his job,” “I know every manufacturer wants more sales. However, if the rep comes back and describes real obstacles he’s facing in getting those orders, the manufacturer has to be open to the discussion. It will do no good to keep reminding the rep that sales are lagging. Remember that the real world can be quite different from the world of research. That’s why an open discussion on problems or obstacles will lead to a sense of never-ending improvement, allowing you to succeed in the real world.” 📱

