

# Mutual Action Planning

## How to Get Critical Feedback from An Independent Rep

By Peter Zafiro

**T**he major challenge in today's business environment is how to create sustainable, profit inertia. When interacting with your sales force, you are faced with the obvious results oriented approach: Bring in profitable sales and measure your success versus your expectations.

But how do you get salespeople to report critical field data and help your business succeed?

How do you build a sustainable interactive communication culture that focuses on the bottom line and provides the critical data necessary to grow your business?

Does your direct sales force provide up to the minute, critical data necessary to catapult your business? The vast majority of business owners and general managers would answer simply no. The Pease Group has engaged over 1,000 companies and verified the lack of success gathering critical business intelligence.

Even with all of today's powerful reporting tools, including mobile devices, cloud software and user friendly business systems, finding the company that gets the critical sales field data to make the strategic decisions necessary to stay ahead of their competition and their respective industry is very rare.



# mutual action planning is the tool to set up the culture within your organization

Now add to the mix the independent sales representative as your main method to sell your product. Is it even possible to get field data? Can you get relevant customer and prospective client information from independent reps?

First on the list to tackle this daunting challenge is creating the right culture within your organization. This helps significantly when your sales reps are flourishing and are pulling your business forward.

Mutual Action Planning is the tool to set up the culture within your organization. This is a structured approach to establishing a culture that rewards mutual success, your reps and your companies.

Mutual Action Planning not only establishes a report structure, but also sets up a bilateral communication that provides comprehensive and meaningful information sharing. Mutual Action Planning is scheduled at fixed intervals and conducted



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with the key decision makers for the company and the rep firm. The stakes are higher at these meetings as time is precious. Hence the data shared will be at a higher level. More important – the action items set forth will be meaty.

Ultimately the success of any plan requires the complete buy-in from the parties needed to execute the plan. The most successful Mutual Action Plans have a balanced action item list – *both* the sales rep *and*

the manufacturer have to complete actions. When all parties have skin in the game, there is a mutual commitment to reach the goal.

If one party falls short and the other completes their action item, the subsequent meeting or communication is toward how to get the incomplete action caught up. The peer pressure gets applied properly to get the non-conforming party to pony up the resources and time to get their action item completed.

In the worst-case scenario, one of the two parties completely fails to honor their agreement, which is a clear sign. Do they really want to be in this relationship?

When both parties fail to honor their agreement and general apathy is prevalent, there is mutual agreement. It is to ignore each other's business and carry on.

The best-case scenario has both parties elevating their game to where they consistently challenge each other toward creating a highly evolved business relationship. The rewards are high.

Mutual Action Planning is a breathing, living culture permeating throughout both organizations and at all levels.



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It is truly amazing to see the companies that get it and practice Mutual Action Planning. Then compare these results-oriented and people-driven organizations to the companies that are often struggling with a constant barrage of issues and problems.

Mutual Action Planning provides a valuable tool that fosters a strong, collaborative sales rep to manufacturer relationship – and vice versa. The reality is, you will never achieve a nirvana, end all, be all state. That is impossible because as challenges arise, you will need to constantly adapt.

Mutual Action Planning not only helps you adapt, it allows your reps to become an integral part of your decision making process. This is not only good for the company culture; it ends up being very good for your pocketbook. [E3](#)

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