

Guidelines to Planning a Territory Visit

An Electronics Representatives Association White Paper

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The following guidelines are recommended for all manufacturer FACTORY sales managers, manufacturers' representatives or other visitors when planning and implementing territory visits.

'Passport' into the Territory

Territory visits are a very important element in the working relationship between the field sales firm (representative) and the manufacturer. In today's environment, customers may be very reluctant to see factory visitors unless there is a specific need or reason.

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 it can do harm to the customer relationship as well.

While navigating a territory visit, everyone must keep in mind that there are **topics that are NEVER to be discussed:**

- Sex, politics and/or religion;
- Problems with other field sales firms;
- Salaries; and
- Problems within your company.



Planning Time Line

Six Weeks Out

Planning notification: Make very clear with the representative the agreed upon length of the visit as well as the territories to be visited (if representative is a multi-territory company).

Four Weeks Out

The visit agenda and the target accounts should be outlined, as well as critical issues to be addressed and objectives to be accomplished

Two Weeks Out

The factory visitor(s) and representative should discuss strategic accounts, key objectives and issues. They should also confirm appointments and agendas for customer visits as well as discussing any "hot" personality issues among the individuals they will be visiting.

One Week Out

The factory visitor(s) and representative should cover pre-visit information. *(See following section on Pre-Visit Information and Planning.)*

Planning the Visit

Duration of Visit

Considering airfare and travel time, the ideal visit is three days and two nights. Single-day visits should be avoided, unless warranted by special circumstances.

Target Accounts

A balanced mix of established accounts and new (qualified) business opportunities should be included, with "hot" or critical issues given priority.

Visit Logistics

- Flights: Confirm arrival and departure information for all visitors. (It is recommended that flights be timed in the morning or evening.)
- Hotel reservations: Confirm who is responsible for making them.
- Entertainment: Confirm requirements with customers for when, where, who, etc.
- Transportation: Is a rental car needed? If so, confirm who is making arrangements.
- Appointments: Using an email "meeting notice" is recommended to confirm all appointments.

Pre-Visit Information and Planning

- Discuss key account strategies for good calls.
 - Ensure that 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.
 - Determine any training that can be covered during the visit.
 - Review any service or product issues with customers in the territory.
 - 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
- Analyze the business being done in the territory prior to the visit.
 - For strategic accounts, a review between the representative and the factory should be conducted one week prior to ensure that all materials needed for each sales call will be brought in.
 - Focus on growing factory influence at each account, i.e., by setting up meetings with personnel from various departments, including program managers, the director of engineering and/or commodity managers.
 - Discuss short and long-term goals for each customer



to be visited as well as the strategy for each call. Roles during the call should be identified and agreed upon at this time.

- Confirm all dates, factory visitors, target account visits and major activities.

Unannounced Visits to the Territory

Another standard best practice for factory personnel is to refrain from visiting a territory unannounced. There are times when emergency visits must occur, but the representative should be notified of such visits as soon they are conceived. Factory visitors should never assume that a representative can “just make time” for them in an unannounced situation. Nor should factory personnel ever visit a territory, for any reason, without the representative being aware of the visit. History and experience have shown that this practice is simply bad form and causes subsequent problems for all concerned.

Standard Practice: Expenses While Visiting

While factory visitors travel in the territory, it is customary that sales reps and factory personnel share equally in the costs of dining and entertainment with each other. This most often becomes a potential problem when non-sales types travel to the territory. These individuals are not usually frequent visitors and so need to be coached by their management regarding their obligation to share in the cost of dining and entertainment. When multiple factory visitors are traveling together, unless there is company policy directing otherwise, it is best for the senior member among the factory visitors to pay the tab for dining and/or entertainment, making approval of those expenses easier and smoother.

Also for consideration, there are factors that push the responsibility of expenses in the direction of the factory visitor. Specifically, when entertaining a customer, it should always be the responsibility of the factory to pay that expense since the representative bears the burden of paying that expense all year long when a factory person is not present.

The Sales Calls

- Agree in advance who will take the leadership role as the “quarterback” during each sales call, the factory visitor or the representative. Either way, the representative should always handle introductions and the preamble to the meeting.

- Also agree in advance who will take notes. The note taker must capture all agreed-upon action items.



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

- To grow your influence at the account, focus on adding value for each customer.

- In special circumstances, distributors may be invited to join in on a factory/rep sales call. When this is the case, certain considerations should be made:

- a) Don't rely on the distributor to set up the customer visit.

- b) Do not let the distributor salesperson be the “quarterback” on the sales call.

- c) Focus on the purpose of this visit with the distributor present.

- d) Don't discuss other product lines while distributor personnel are present.

Murphy's Law: Handling Problems and Having a Back-up Plan

The factory visitor(s) and representative should discuss and have a plan to handle any and all problems that may arise, especially when high-level executives are visiting a territory. Circumstances to cover in your plan include:

- Calls that run too long;
- Last-minute changes;
- No-shows;
- Scheduling too much;
- Incompetence;
- Last-minute cancellations;

and/or

- Weather issues (e.g., snow, storms).

Always be ready with alternative accounts to call on if an appointment falls through for whatever reason.



After the Sales Calls

- **Factory Visitor(s):** Follow-up promptly and copy your field sales firm on all correspondence resulting from your visit. **Always DO what you tell the customers you are going to do WHEN you tell the customers you are going to do it.**

- **Representative:** Within 24 to 48 hours, send call reports to the factory visitor(s) (and any others who should be copied).

- a) Provide detailed accounting of details of customer visit.

- b) Some agenda/action items may be copied to the
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customer, but both the factory visitor(s) and representative should discuss these first.

c) Provide a specific list of action items with clearly defined ownership of each action item.

d) Urgent action items should be treated separately from the call report.

e) Remember that **the representative ultimately owns all action items until they are completed.**

• **Factory Visitor(s):**

a) Within 48 hours of receiving the call reports from the representative, acknowledge receipt of the reports and respond to representative with suggestions of amendments and/or editions to the reports.

b) Visitor is responsible for ensuring that all factory-owned action items are followed up by the due date(s) agreed upon in the call reports.

c) Now it's time to plan your next territory visit so it as successful as this one! ■

About the Authors of This White Paper

ERA is deeply grateful to the co-authors of this white paper for their time and expertise in developing these guidelines. This publication is based on the content of a breakout seminar presented by the co-authors at ERA's 46th Management and Marketing Conference in October 2013.

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