

Field Sales Meetings

Suggested that these are run on a 6-weekly basis, each lasting for half a day.

The goal of the meetings would be to achieve the following:

1. Personal review of sales and territory performance for each person
2. Sharing of ideas, wins, tips and learning across the team
3. Structured training/company input to develop skills/capabilities
4. Motivational leadership injection to focus and engage the team

Suggested Structure

0800 Meet for sales breakfast (tea, coffee, bacon rolls etc)

0830 Sales Manager opens meeting

0845 Each team member reviews own performance and shares tips/ideas

1000 Sales Manager reviews and summarises team performance

1030 Coffee/Tea Break

1045 Sales skills training, franchise or product training, or company session

1215 Sales Manager closes and sets "Theme" for the next period

1230 Lunch or Depart – Depending on business need (see below)

Following the meeting, it is suggested that individuals needing 1:1 management or training support remain behind for dedicated sessions with the sales manager or external trainer, as needed. This will make better use of time than leaving the support until later in the month, when the need is likely to have been forgotten.

Suggested themes for training sessions for any field sales team

Personal sales administration: call sheets, diaries, territory & time management

Cold calling, prospecting and opening relationships with new customers

Managing the sales cycle – accelerating progress from 1st meeting to closing

Negotiation skills, consultative sales skills & confidence: building performance

Field Sales Management and Coaching

The following suggestion is designed to help in transferring skills, confidence and capabilities to the sales team on a 1:1 basis.

It is based around classical field sales management and will aid in creating a positive and performance focused team. It will also, however, cause some challenges and difficulties in the early phases, as existing issues with each team member will surface quickly.

The key is to engage positively and consistently with everyone. This means catching them doing things right, lifting their spirits when they are struggling and to show that, however tough it is, we always visit one more customer or move the deal forward one more step. Positive sales management is the key.

Outline of the approach

1. Each Friday every member of the team will submit a call schedule for **ONE** day of the following **WEEK**, where their sole focus is on client sales visits. The schedule should include at least 3 planned visits and allow for additional cold-calls/drop-ins.
2. Each **MONTH**, the Sales Manager will meet once with every member of the team to invest a **whole day in accompanied visits/sales coaching** and leadership. These visits will not be planned in the sales meetings, but around the sales managers own routine and diary.
3. The Sales Manager will call a member of the team at **close of play the day before** the one for which they submitted a call plan, in order to arrange to meet them on the way to the first customer. They will then spend the entire day with that team member. Coaching, supporting, training and managing 1:1.

To achieve this, there often needs to be a **reduction in office-based meetings** with the sales teams and potentially a reduction in the personal sales activity for the sales manager, where they have their own portfolio.

Much of existing sales management time is often spent assisting the team members by phone or in the field and the goal of these field days is to train, develop and manage the team members to a higher level of individual capability and performance. Over time and after initial problems have been addressed, there will be a much higher level of ownership within the team for their own decisions and actions – reducing the workload on the sales manager.

The only way this approach works is if it becomes the routine way of working.

The field sales management days with each member of the team should continue for everybody in the long-term.