

# ***THE PROPER SALES CALL***

## **1. THE NIGHT BEFORE**

- a. REVIEW YOUR ROUTE - THE PROPER SALES CALL STARTS AT YOUR DESK THE NIGHT BEFORE YOUR SALES ROUTE. BEFORE YOU GET READY FOR THE NEXT DAY SALES PROFESSIONALS NEED TO DEVELOP A PLAN OF ATTACK. A PLAN OF ATTACK REQUIRES ASKING A LOT OF QUESTIONS & TAKING NOTES:
  - i. WHAT DID I PROMISE THE DECISION MAKER LAST TIME I WAS IN THEIR ACCOUNT?
  - ii. WHAT NEW PRODUCTS WOULD BE GOOD TO PITCH?
  - iii. WHAT DISPLAYS DO I WANT TO FOCUS ON?
  - iv. WHAT MAINTENANCE ISSUES DO I NEED TO TAKE CARE OF?
  - v. WHAT SIGNAGE OR PERMANENT P.O.S. DO I NEED TO BRING WITH ME?
  - vi. WHAT PROGRESS CAN I MAKE TOMORROW? WHAT OPPORTUNITIES ARE THERE?
  - vii. WHAT EXCHANGES OR REPACK DO I NEED TO RESOLVE?
  - viii. HOW CAN I BE GREATER THAN MY COMPETITOR IN THIS ACCOUNT?
- b. TAKE NOTES – DURING YOUR REVIEW OF YOUR NEXT DAYS ROUTE TAKE DETAILED NOTES FOR EACH ACCOUNT. THIS WILL PROVIDE YOU WITH AN ORGANIZED GUIDELINE FOR YOUR ROUTE AND WILL PLAY AN INSTRUMENTAL ROLE IN THE SUCCESS YOU ACHIEVE IN EACH ACCOUNT. WALKING

INTO AN ACCOUNT BLIND WITHOUT ANY PREP WORK IS A RECIPE FOR FAILURE AND IS UNACCEPTABLE FOR ANY SALES PROFESSIONAL.

## **2. SELLING BEGINS IN YOUR CAR**

- a. OBSERVE THE OUTSIDE OF YOUR ACCOUNTS – NORMALLY THE PHRASE “SELLING FROM YOUR CAR” IS A NEGATIVE PHRASE, BUT PART OF THE PROPER SALES CALL STARTS FROM THE OBSERVATIONS YOU MAKE SIMPLY BY DRIVING UP TO YOUR ACCOUNT. ADOPTING THE BELIEF THAT SELLING DOESN’T START UNTIL YOU ARE INSIDE OF YOUR ACCOUNT WILL CAUSE YOU TO MISS OUT ON MULTIPLE OPPORTUNITIES. THE FIRST THINGS CONSUMERS SEE WHEN THEY PULL INTO A PARKING LOT CAN LEAD THEM TO A PURCHASE.
- b. LOOK FOR OPPORTUNITIES – DON’T LET YOUR COMPETITION BEAT YOU TO A NEW IDEA OR WAY OF PROMOTING YOUR BRANDS. BE THE SALES PROFESSIONAL THAT IS OFFERING FRESH IDEAS TO YOUR RETAILERS THAT WILL HELP THEM INCREASE THEIR BUSINESS. CONSTANTLY OBSERVE AND ASK YOURSELF WHAT OPPORTUNITIES THERE ARE AT EACH ACCOUNT. REMEMBER ASKING IS 90% OF SELLING AND IF A RETAILER DOES NOT LIKE ONE IDEA THAT DOES NOT MEAN THEY WON’T LIKE THE NEXT ONE.
  - i. ARE THERE ANY OPPORTUNITIES FOR WINDOW SIGNAGE?

- ii. ARE THERE ANY OPPORTUNITES FOR LARGE BANNERS OUTSIDE?
- iii. ARE THERE ANY OPPORTUNITES TO COMMUNICATE SPECIAL PROMOTIONS OR IMPORTANT ADS?
- iv. ARE THERE ANY OPPORTUNITES TO HAVE SIGNAGE AT THE GAS PUMPS?
- v. ARE THERE ANY OPPORTUNITES THAT NO ONE HAS THOUGHT OF BEFORE?

### **3. REVIEW YOUR GAME PLAN**

- a. REVIEW YOUR PLAN OF ATTACK – KNOW WHAT YOU WANT TO ACHIEVE IN EACH ACCOUNT AND EXECUTE. ANYTHING YOU DO NOT ACHIEVE ONE WEEK YOU CAN WORK ON THE FOLLOWING WEEK. BEFORE YOU GET OUT OF YOUR CAR TO START SELLING LOOK OVER YOUR NOTES SO YOU WALK INTO YOUR ACCOUNT WITH A PLAN.

### **4. WALK THE OUTSIDE PERIMETER**

- a. LOOK FOR OPPORTUNITES – SOMETIMES SIMPLY DRIVING UP TO YOUR ACCOUNT AND OBSERVING IS NOT ENOUGH. MAKE SURE YOU WALK THE OUTSIDER PERIMETER OF YOUR ACCOUNT SO YOU DO NOT MISS A BEAT. MAYBE YOU HAVE A BANNER THAT IS WEATHERED OR TORN DOWN? MAYBE YOUR COMPETITION SNAGGED THE SPOT FOR YOUR LARGE BANNER? MAYBE THE ACCOUNT HOSTS BBQ'S OUTSIDE AND

THERE IS AN OPPORTUNITY TO SELL RED BULL? THINK  
OUTSIDE THE BOX AND WATCH YOUR SALES INCREASE!

## **5. SEE THE DECISION MAKER**

- a. GET IN FRONT OF YOUR DECISION MAKER – LET YOUR  
RETAILER KNOW YOU ARE THERE SO THEY CAN SEE YOUR  
EFFORTS AND YOU CAN BUILD A SOLID WORKING  
RELATIONSHIP.
  - i. ASK YOUR DECISION MAKERS QUESTIONS SO YOU  
KNOW WHAT THEY ARE THINKING
  - ii. LISTEN TO YOUR RETAILERS SO YOU KNOW WHAT  
THEY WANT AND HOW TO BE THEIR GO TO SALES  
PROFESSIONAL
  - iii. SEE IF THERE IS ANYTHING YOU CAN DO FOR THEM  
WHILE YOU ARE THERE
  - iv. BE HONEST WITH THEM AND FIND OUT IF THEY ARE  
HAPPY WITH YOUR SERVICE AND YOUR LAST WEEKS  
ORDER/PERFORMANCE IN THEIR ACCOUNT
  - v. ASK THEM IF THERE IS ANYTHING YOU NEED TO KNOW  
ABOUT THE ORDER FOR THE CURRENT WEEK
  - vi. TELL THEM YOU WOULD LIKE TO SEE THEM BEFORE  
YOU TAKE OFF AND MAKE SURE THEY WILL BE  
AROUND WHEN YOU ARE FINISHED. IF THEY ARE  
UNAVAILABLE WHEN YOU ARE FINISHED GO OVER  
ANYTHING IMPORTANT WITH THEM WHILE YOU ARE  
IN FRONT OF THEM

## **6. WALK THE ENTIRE ACCOUNT**

- a. OBSERVE & LOOK FOR OPPORTUNITIES – IF YOU HEAD STRAIGHT TO THE BEER ISLE THERE IS NO WAY YOU WILL BE ABLE TO BE GREATER THAN YOUR COMPETITOR IN ANY ACCOUNT. EVERY WEEK IT IS REQUIRED THAT YOU WALK THE ENTIRE STORE OF EACH ACCOUNT LOOKING FOR OPPORTUNITIES, OBSERVING YOUR SURROUNDINGS, AND MAKING SURE NOTHING IS OUT OF WHACK. THE OPPORTUNITIES IN ANY GIVEN ACCOUNTS ARE ENDLESS:
- i. DISPLAYS
  - ii. PLACEMENTS
  - iii. PERMANENT P.O.S.
  - iv. SIGNAGE
  - v. SEASONAL PROGRAMS
  - vi. PRICING
  - vii. AD/TPR/ PROMOTIONAL COMPLIANCE & EXECUTION
  - viii. COOLER SPACE
  - ix. LOCATION OF PRODUCTS IN COOLER SPACE – EYE LEVEL/ ON THE HANDLE
  - x. COOLER PLACEMENTS
  - xi. ETC.
- b. MERCHANDIZING LIST – AS YOU GO THROUGH YOUR ACCOUNT START YOUR MERCHANDIZING LIST FOR YOUR DISPLAYS, SIDE STACKS, & WARM SHELVES SO YOU DO NOT HAVE TO BACK TRACK

## **7. BEGIN YOUR MERCHANDIZING LIST**

- a. MAKE YOUR LIST – AFTER WALKING THE STORE AND STARTING YOUR MERCHANDIZING LIST GET IN FRONT OF THE COOLER AND FINISH YOUR LIST. ONCE YOU HAVE YOUR COMPLETE LIST YOU CAN GET PRODUCT TO FILL YOUR SHELVES.

## **8. MERCHANDIZE & ROTATION**

- a. MERCHANDIZE & ROTATION – FILL THE SHELVES AND ROTATE AS YOU GO. MERCHANDIZING AND ROTATING IS A SIMPLE SCIENCE, BUT IT CANNOT BE OVERLOOKED. MAKE SURE WHEN YOU ROTATE THAT YOU ARE ROTATING PRODUCT FROM EVERY LOCATION IN THE STORE. DON'T FORGET TO ROTATE OR MERCHANDIZE THE WARM SHELF, DISPLAYS, SIDE STACKS, AND ADDITIONAL COOLERS!
  - i. NON ALCHOLICS 1st –MERCHANDIZE & ROTATE YOUR NA'S FIRST SO THEY ARE NOT OVERLOOKED

## **9. MAINTENANCE**

- a. BE METICULOUS WITH MAINTENANCE - TAKE CARE OF ALL OF THE MAINTENANCE BEFORE YOU TAKE YOUR INVENTORY. IF YOU REPACK AND HANDLE BREAKAGE AFTER TAKING INVENTORY YOU MAY RUN INTO OUT OF STOCK ISSUES OR OVERSELLING AN ACCOUNT. MAKE SURE YOU TAKE CARE OF ALL OF YOUR MAINTENANCE ISSUES BEFORE YOU WRITE YOUR ORDER SO YOU DO NOT GET IN A HURRY AND

NEGLECT IT. IF YOU SKIP OVER THE MAINTENANCE YOU'LL SELL YOUR ACCOUNT SHORT, LOOSE SIGNAGE & DISPLAY SPACE, AND CAUSE STRAIN ON YOUR RELATIONSHIP WITH YOUR RETAILERS. REMEMBER TO CHECK THESE MAINTENANCE ISSUES WEEKLY:

- i. REPACK
- ii. BREAKAGE
- iii. DISPLAYS
- iv. SIGNAGE

## **10. INVENTORY**

- a. TAKE A DETAILED AND ACCURATE INVENTORY – IF YOUR INVENTORY IS OFF ALL OF THE OTHER STRENUOUS WORK AND EFFORTS YOU PUT INTO AN ACCOUNT MAY BE JEPARDIZED. IF YOU RUN OUT OF PRODUCT OR OVERSELL ACCOUNTS YOU ARE GOING TO RUN INTO PROBLEMS. IF YOU OVERSELL ACCOUNTS AND HAVE DATE ISSUES YOU ARE GOING TO EXPERIENCE PROBLEMS. TAKING DETAILED AND ACCURATE INVENTORY IS PIVOTAL IN YOUR SUCCESS ON YOUR SALES ROUTE. DON'T ASSUME A CASE IS FULL AT THE BOTTOM OF A 6 CASE STACK IN THE BACKROOM... CHECK IT AND PROPERLY INVENTORY IT. DON'T ASSUME THE CORRECT PRODUCT IS IN THE CASE YOU INVENTORY... CHECK IT AND PROPERLY INVENTORY IT. TAKE YOUR TIME AND DO THE PROPER JOB SO YOU DON'T HAVE TO SPEND EXTRA TIME FIXING YOUR MISTAKES! MAKE SURE YOU

INVENTORY THE ENTIRE ACCOUNT AND ALL OF THE LOCATIONS YOU DISPLAY PRODUCT.

- i. DISPLAYS/ SIDE STACKS
- ii. WARM SHELVES
- iii. ADDITIONAL COOLERS
- iv. MAIN COOLER
- v. BACKROOM

**11. SEE YOUR DECISION MAKER ONCE MORE**

- a. TALK TO YOUR DECISION MAKER ABOUT THE ORDER
- b. SELL IN DISPLAYS, PLACEMENTS, WINDOW SIGNS, PERMANENT P.O.S., TALK ABOUT AD ACTIVITY, ETC. GO OVER ANYTHING YOU WANT TO ACHIEVE.
- c. ASK IF THERE IS ANYTHING ELSE YOU CAN DO
- d. LET THEM KNOW WHEN YOU'LL BE BACK
- e. TAKE NOTES IF THEY REQUEST ANYTHING

**12. WRITE YOUR ORDER**

- a. NOW YOU CAN WRITE YOUR ORDER – NOW YOU CAN SEE WHY SALES PROFESSIONALS THAT ARE CONSIDERED “ORDER TAKERS” ARE INEFFECTIVE SALES PROFESSIONALS. WRITING AN ORDER IS INCREDIBLY IMPORTANT, BUT IF YOU TAKE SHORT CUTS OR SKIP OVER NECESSARY STEPS YOU WILL NOT MAKE IT AS A SALES PROFESSIONAL. BEING A SALES PROFESSIONAL IS AN INCREDIBLY COMPREHENSIVE JOB. THE PROPER SALES CALL REQUIRES A GREAT DEAL OF



ORGANIZATION, DETAIL, FOLLOW THROUGH, AND DISCIPLINE.

b. THERE IS A LOT TO KEEP IN MIND

- i. AD'S/ TPR'S/BUYING IN ON PROMOTIONS
- ii. SEASONAL ITEMS
- iii. SPIKE IN SALES DURING KEY HOLIDAYS OR THE SUMMER
- iv. SPIKE IN SALES IF THERE ARE LOCAL EVENTS NEARBY
- v. KEEPING AN EYE ON THE SUCCESS OF NEW ITEMS

**13. TAKE YOUR FINAL NOTES**

- a. CHECK OFF WHAT YOU ACCOMPLISHED FROM YOUR NOTES
- b. ADD TO YOUR LIST FOR NEXT WEEK ANYTHING YOU WERE UNABLE TO ACHIEVE
- c. TAKE NOTES OF ANYTHING YOU PROMISED
- d. TAKE NOTES OF ANY NEW OPPORTUNITES YOU DISCOVERED
- e. TAKE NOTES OF ANYTHING YOU NEED HELP WITH FROM YOUR SUPERVISOR

**14. FOLLOW THROUGH**

- a. MAKE SURE ANYTHING YOU PROMISED GOT DONE!
- b. FOLLOW UP WITH DRIVERS, MERCHANDIZERS, OR SUPERVISORS TO MAKE SURE THEY COMPLETED WHAT WAS ASKED OF THEM
- c. CALL OR RUN BY YOUR ACCOUNT TO MAKE SURE THEY WERE SATISFIED WITH WHATEVER WAS PROMISED