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## ***Factory Product Training for Sales Representatives (Professional Field Sales Force Training)***

As the industry matures, customers are looking for differentiation in both the products they buy and/or sell and the service they receive from their suppliers. The performance bar is always being raised. Since manufacturers and their manufacturers' representatives constitute the closest alliance in today's food service marketplace, it is clear that competent training for the representatives at the factory or some other suitable site must go to a new level. It is not sufficient to know just a few features and benefits. Today's partners, the manufacturer and the sales representative, must become intimate with their products and training programs. If you do not have a training program, NOW is time to start!

The following is a basic list of important factors to consider when developing a professional training meeting for your representatives. Background material and supporting documentation including details of each segment shown below and magazine articles can be found on following pages in order of use.

Here is an outline for establishing a professional training program with your manufacturers' representatives:

- I. Selecting the sales management team
- II. Establishing the agenda with time frames
- III. Setting up meeting logistics
- IV. Implementing the agenda
- V. Supporting documentation
- VI. Gauging your meeting's success

### **I. Selecting the Sales Management Team**

The best meetings are those for which attention is paid to the details. It should include a blend of information, training, and socializing. It's not a job for a single person, but a multiple of key personnel. The people involved need to understand that they are in a very important position and that the effectiveness and thoroughness of the training can directly impact the success of the company.

In most cases top sales management is the natural place to select the team that will present the product training session. When new or drastically revised products are being covered, it is also helpful to include the person(s) most directly involved in the development of the product. Other departments such as Customer Service and Technical Support should be included if their impact is material to the product(s) being presented.

A team leader should be selected within the group. It should be someone who not only has the understanding of the meeting process but the time to monitor the progress of contributing departments to be sure all the details come together within the proper time frame.

It is important to remember that the major objective is to impart knowledge in various forms to someone who can use it in the sales process.

Train the Trainer; for greatest results with product training sessions it is desirable for the primary trainer to be someone who is trained as an instructor. Few if any managers have had this kind of training. The trainer and all factory personnel should also know exactly all details of the role of the professional representative and how these services directly impact your company in the marketplace. For more information, please call MAFSI Headquarters or refer to other chapters in Principals of Decision.

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The trainer should be fully versed on the products, their evolution, their place in the market, as well as the competition's products. They must understand that he or she is training professional sales people not engineers. It is also important to include responses to what the customer sees as benefits to the competitive models. As insufficient information could cause a problem, there is also a danger in giving too much information.

Factory personnel should be counseled in advance. Advise them that for a representative a factory visit and hotel stay is not a perk! They don't need another reason to be away from home. They should be made to feel completely welcomed and that they are a valuable member of the team.

## II. Establishing the Agenda with Time Frames

The agenda is a key factor in determining the ultimate impact of your program. The agenda should be developed based on the scope and intent for the meeting as established by the team.

The preliminary agenda should be distributed to the company's Rep Council members for their input during the planning process. In the absence of a rep council, select a sample cross-section of reps (some veterans, new reps, etc.) for their review. For more on Rep Council's please refer to the Rep Council chapter in **Principals of Decision**.

Consideration should be given to the make-up of the attendees with regard to tenure and the objectives of the meeting. If the meeting includes "green" recruits and seasoned veterans consider starting the agenda a day earlier to bring the new people up to speed with the basics.

Send a final draft to all attendees. Make the topics as specific as possible in order to build anticipation and encourage preparation.

Each agenda item should include a timetable for starting and ending. The team leader should maintain control of the timetable as an observer in the room. A sample agenda includes:

### **Introduction**

The highest-ranking executive should welcome the attendees, state briefly the intent and scope of the meeting and encourage active participation. A short history of the company and product evolution is effective when new representatives are in the majority.

### **Start the Program**

The primary presenter should take over from here and set the groundwork and rules for the meeting. If this person also does the product presenting he should get started. Each section or product should include the names and introduction of factory personnel who interface with the representatives.

### **Features and Benefits**

Features and benefits should be supplemented with "advantages" to ease the understanding of the product for the customer. Full documentation should be provided for all items. Provide as much hands-on training and group interaction as possible.

### **Applicable Markets**

Provide information on specific markets and prospects that are impacted by the product(s) along with specific applications. Your representatives have very close ties to certain segments of the industry but a new product may require learning a new set of names and faces. Provide them to your representatives. This information should also include what customers are currently using in place of these products and provide solid reasons why they should change.

### **Price**

Price comparisons should be completely objective including the availability of any additional discounting that may be available by your company and/or the competition. Detail the added benefits that may account for the price difference.

### **Value-Added Items**

Sales add-ons, extended warranties, and a list of valuable options can help close a sale. However, all customers have their own view of what brings value to the equation. His is the only view that counts. If he/she doesn't think your feature has value to him/her, then it doesn't. And he won't be willing to pay for it.

### **Testimonials**

Copies of third-party testimonials on their letterhead are a good way of injecting recognized names of people whose opinions are respected.

### **Q & A**

Sufficient time should be built into the schedule to allow for meaningful questions and answers. Q & A are necessary to help clarify and build the representative's confidence to properly represent your products. If a clear, concise answer is not available it needs to be stated up front but answered and fully documented to the representatives before they leave and get back to work in their territories representing your products.

Solicit and sincerely accept input, criticism, and new ideas on how to improve the training sessions. If they come up with ways to improve the process they should be considered as free consulting services. Take the ideas to the bank. Finally, encourage the sharing of success stories.

During factory tours production staffers must be advised to pay particular attention to representative's recommendations on manufacturing techniques. Representatives visit many old as well as state-of-the-art manufacturing facilities. They all have knowledge of other processes that may apply in your operation. It is suggested that tour groups be small enough to afford everyone the opportunity to hear the presenter first-hand. Audio devices can and should be used to improve the clarity and effectiveness of the communication.

### **Breaks and Refreshments**

Understand that sitting in a meeting for several hours can be physically taxing. It is important to schedule adequate breaks to allow for stretching, telephone calls, and beverage intake.

### **Social Interaction**

The best results of representatives working with factories are achieved when all parties know, understand, and respect each other. A social event with all people who interact with representatives is an essential part of the training process. It offers all parties the opportunity to build relationships based on personal attributes not affected by the business. This will provide a smooth working relationship and a greater share of the representative's time and mind.

## **III. Setting Up Meeting Logistics**

The person in charge of meeting logistics must verify all site and other conditions, including expected weather, well in advance of the meeting. This includes coordinating the travel schedules of all presenters. If travel is necessary between the factory and meeting site verify the travel time using group transportation (preferably chartered vehicles). Also be sure to consider any specific dietary restrictions on the part of all attendees.

Meetings are ideally held away from the office to insure a minimum of interference and distraction. However, if a plant tour is an important part of the meeting it should be scheduled at an appropriate point in the agenda. Minimize the travel time, outside distractions and arrange for proper transportation.

Do not allow any pagers or cell phones to be used during the meeting and provide appropriate audio/visual support. Provide an adequate supply of cold water and fresh oxygen-rich air.

It is customary for the manufacturer to cover all the individuals landed costs including airport transfers, meals, planned recreation, and some incidentals. The representative is generally responsible for travel for up to two people from his or her firm. If the manufacturer requests more than that, the factory should cover the additional airfare expenses.

Start early and on time. Provide networking breaks and interactive sessions in the afternoon. Don't go much beyond 4:00 PM. A light lunch should be furnished at the meeting site with time for a little leg stretching.

## **IV. Implementing the Agenda**

Keep the meeting on schedule.

Be sure each segment is properly documented with handouts. Hearsay is not admissible in selling situations.

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Keep the side chatter that drifts to personal or territorial issues from the floor. Provide a time immediately after the meeting to cover these issues.

Allow the synergy of the representatives to build the interest and understanding of the products.

To accent specific product groups, have one of your experienced representatives give a case history (or two) of a success with this product group.

## V. Supporting Documentation

Even with the advent of the “digital age” workbooks are still the most convenient way to compile and distribute information at a training meeting. Below is a list of information helpful to the representatives once they are back in the field:

- A brief history of the company and the evolution of the product line.
- A Company organizational chart with job functions and phone extension numbers.
- Drawings, spec sheets, and brochures of the products covered.
- Details of how the product is constructed, operated, and serviced.
- Features, advantages, and benefits of the products.
- Competitive manufacturers features and benefits.
- Identification of target markets with specific accounts.
- List of end users.
- Comparative pricing spreadsheet.
- Value-added features and benefits to aid the sale.
- Third party testimonials.
- Buying group and other key dealer programs.
- New account policies and application forms.
- Sales aids, samples, materials, components

As a travel convenience, the manufacturer should offer the option to ship meeting materials back to the representative’s office if they exceed a simple three-ring binder. The same information should be available as e-mail so that attending representatives can forward a copy to their company personnel not able to attend the meeting. The representative owner should be able to add editorial notes in a different color adding the benefit of his or her perspective to the report.

## VI. Gauging Your Meeting’s Success

If you have properly defined and executed a meeting your attendees will have accumulated the knowledge you intended. How do you gauge the success of your meeting? Listed below are several easy vehicles.

At the close of each meeting, pass out evaluation forms to all attendees. These evaluation forms should thoroughly cover all the aspects of the meeting, from content, breaks, logistics, location, etc. It is imperative that the evaluation forms be distributed to the attendees and completed before the meeting concludes. You will want to give the attendees adequate time to complete the evaluations because they will provide you with constructive and valuable feedback in developing and implementing subsequent meetings with your professional representatives. Another vehicle is to set up mutually agreed upon conference calls with the attendees for the purpose of reviewing the important points of the meeting.

An alternate follow-up is to send out an abbreviated note and literature package to the attendees. A brief outline with supporting documentation will go a long way to reviving interest generated during a good training session. It will also help solidify the information learned.