



# GUIDELINES

**FOR INTERACTION BETWEEN  
REGIONAL SALES MANAGERS AND  
MANUFACTURERS' AGENTS**

# Objective

**THESE GUIDELINES WERE DEVELOPED TO PROVIDE** a clearer understanding of a Regional Sales Manager's (RSM) duties, responsibilities, objectives and interactions with Manufacturer's Reps.

It is not our intent to write a job description for RSM; that would be presumptuous and unrealistic. We do, however, intend to suggest specific requirements that we feel are essential to effective marketing in the marketplace.

While we debated about the content of this paper, we discovered that the length could be endless. We decided, rather than write a job description, to outline certain basic objectives that both RSM and manufacturer's representatives should achieve. Once these "basics" were agreed upon, then we would make recommendations on areas which need to be redefined or concentrated upon.

## **Objectives for Regional Sales Managers (Basic)**

- 1.** Training of new sales people in a representative firm.
- 2.** Assist end user and representative problems with the factory.
- 3.** Introduce new products and programs.
- 4.** Provide technical assistance to end users or representatives.
- 5.** Help in establishing goals and forecast in a territory.
- 6.** Provide support to representatives to enable them to achieve the goals.
- 7.** Assist in closing important orders.



## **Objectives for Manufacturer's Representatives (Basic)**

- 1.** Develop new business.
- 2.** Expand business with current customers.
- 3.** Service customers in such a manner that they want to continue to do business with the manufacturer.
- 4.** Be an extension of the manufacturer's business.
- 5.** Manage the territory with regards to:
  - a.** Competitive activity
  - b.** Sales meetings
  - c.** Trends in the marketplace
  - d.** Marketing their products
  - e.** Establish customer base

These previous objectives are all very fundamental and could be expanded upon tenfold. However, we will leave specifics and objectives to the individuals involved.

## **Areas to concentrate on:**

### **Expertise**

It is damaging and embarrassing to all elements of the industry to watch a semi or untrained regional manager make a dealer or end user call.

Our position regarding training is firm. The factory regional manager should be the expert on their company's products. Anything less than the "most knowledgeable person" should not be acceptable by either the manufacturer or the representative agency. The single most effective way to not get into a bid situation is with superior selling skills and product performance information. Lacking this, the regional manager becomes more of a problem than a solution.

The factories must place greater emphasis on teaching their field managers both product knowledge and selling techniques. They should also be well versed in the policies of their manufacturer, as well as possessing general background information pertaining to the role their representatives play. Those lacking this information should not be sent to the marketplace.

### **Authority**

Assuming impeccable credentials regarding product information and selling techniques, the regional manager cannot succeed without the authority that balances their responsibilities. We feel the factory must empower the regional manager for two key reasons:

- 1.** To grow their share in that market.
- 2.** To create an effective and objective measure of the regional manager's performance.

Sending a regional manager to the market without proper authority will not only fail to gain the desired increase, it will create a negative impression with several segments of our industry. It is our feeling that the more the factory decentralizes authority, the more effective they will be in the future.

### **Scheduling Of Visits**

Regional managers should give sufficient notice to the representative firms of upcoming visits. At least 30 day notice should be given, and specific objectives should be stated. With advance notice appointments can be confirmed and business conflicts can be avoided.

In a different period in the foodservice industry, having a regional manager visit a territory and basically make "social" calls on existing good customers may have been acceptable without a critical examination of the same. The local marketing agent should collect information, funnel that to the regional manager, then collectively plot the strategy to be used to capture new and incremental business.

Some calls to maintain "goodwill" obviously should be made. However, if the regional manager only wants these calls scheduled, it becomes the responsibility of the agency principal to communicate this to senior factory management. If they cannot or will not do this, then they should persuade the regional manager that they jointly need to pursue new business.

### **Joint Responsibility/Review and Planning Session**

The representative is the every-day presence in the market. The regional manager is in several market areas that may differ in many aspects. We feel that, for maximum effectiveness, this inside/outside viewpoint should be shared in regularly scheduled planning sessions.

Input from both parties is vital in today's market to help determine strategy and tactics for successful (read "profitable") growth. Mutually agreed upon goals will help create a bond between representative and manufacturer. This activity, if practiced regularly, and reviewed annually, will improve the ally relationship we need to have between representative and manufacturer. If that alliance fails to produce results, it may indicate that sales management needs to more closely monitor their field sales position.

### **Cost/Purpose**

Conversation with many representatives, dealers and field managers suggests factories do not get maximum effectiveness from their field sales people. Failure to search for more effective methods using both representatives' and regional managers' input will only result in poor use of a company's assets and under-utilization of their representatives' effectiveness in the market.

From the representative's viewpoint, if the regional manager cannot bring solutions, information, partnership attitude and help in analysis, they inhibit the ability of the representative to maximize sales.

Careful consideration should also be given to unnecessary or excessive paperwork, i.e. call reports, territory analysis, competitive surveys and market changes. Although this information can be very beneficial, if done to excess, it can become counter-productive, taking valuable time away from the rep's selling duties. Additionally, this excess paperwork could challenge the claim of independent representatives and could make them appear as employees. This could raise a whole new set of operating dilemmas.

All of the "tools"; i.e. social media, e-mail, CRMs, AutoQuotes, SpecPath etc. will not bring about the necessary changes. It must be done by managers who understand the importance of strong representative/manufacturer alliances, who analyze, execute and monitor the new plans that are necessary for success in today's turbulent marketplace.

### **Closing**

The difficulty in establishing guidelines comes in the compliance and the evaluation of these objectives. Today manufacturer's representatives are working harder than ever providing key marketing functions that previously were performed by the food service distributor. Manufacturers are working harder to provide quality products at economical prices in a flat or slow growth economy. Both representatives and manufacturers are struggling to produce profits sufficient

to enable both to expand services, personnel, research and development and training.

Until we all realize that we are in the foodservice business together, sharing common goals and philosophies, we will continue our present non-communicative relationship. Most manufacturers feel free to evaluate manufacturers' representatives performance, but we don't know many representatives who would freely evaluate their regional sales managers performances.

Times are changing, and we must all realize that professionalism is the key to mutual success.