

# A Value-Added Road Trip

In this road trip scenario, a rep uses customer relationship management (CRM) and sales force automation (SFA) tools to optimize her trip and ensure that she is adding value as a distribution channel facilitator.



## Preparation

Our rep establishes her objectives

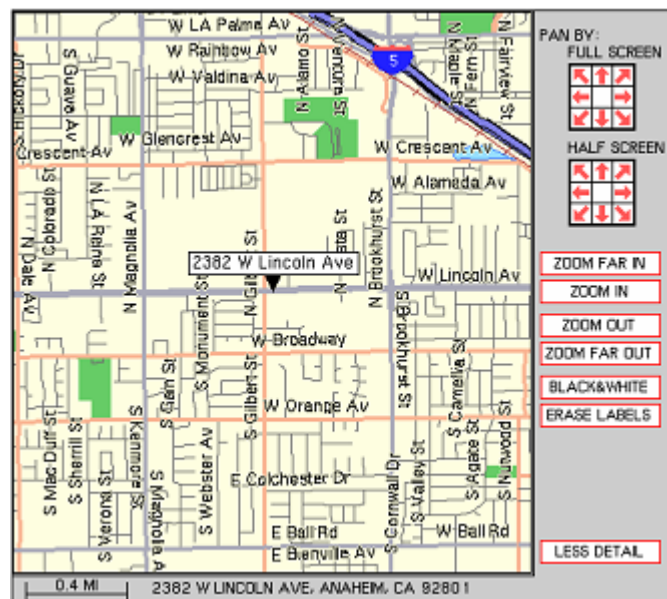
1. Increase sales by selling more products (deeper) within lines to current customers, selling additional lines (broader) to them, and adding new customers
2. Make my customers purchasing decisions easy by providing graphic, compelling reasons for what they should buy
3. Reinforce my customers' perception that I bring value to the order process so that my agency remains their first choice

In preparing for her trip, she will use her agency's software and data to analyze order history and create customized catalogs to target who to sell to, where to sell, and what to sell. As the first order of business, she synchronizes her database to assure that she has the latest pricing, shipping, and inventory information available.

**Targeting who to sell to** - With a limited amount of time on the road, her sales calls need to be targeted to assure that her best customers are getting the sales call frequency that they deserve and that any new customer opportunities are followed-up.

For some new leads, she only has the phone number. So, she uses the *Internet Reverse Lookup* tool to obtain the address information and the *Internet Map* tool to locate the address with directions. The map tool also assists her in determining proximity to avoid cannibalizing other customers' sales.

Existing customers: She prints a *Customer Snapshot* (summary) of the territory filtered by city,



state, zip code range, customer type, or combination of these fields. The customer snapshot provides notes, contact names, number of times contacted, and a trend analysis of lines they buy.

## Customer Snapshot

18-Nov-03

<b>Lil' Shop of Hors D'oeuvres</b>		6562-9722 Fax: 6562-9723		<b>Type:</b> Gift And Gourmet <b>Updated</b> 11/18/03								
<b>BillTo:</b> Geislweg 14 Salzburg 5020				<b>Rep:</b> Haney, William								
<b>ShipTo:</b> Geislweg 14 Salzburg, 5020				<b>Status:</b> Active								
				<b>Began</b>	<b>Contacted</b>							
				12/5/97	LastYr YTD							
Sheila Kennedy	555-999-7770	Business	Home Furnishings	1	4							
Paula Jones	55583-7770	Business	Cheese Dept	0	2							
Kate Kern	55583-7770	Business	Table Top	1	0							
<b>Vendor</b>	<b>2001</b>	<b>2002</b>	<b>%±</b>	<b>YTD2001</b>	<b>YTD2002</b>	<b>%±</b>	<b>YTD</b>	<b>OnOrder</b>	<b>LastInv</b>	<b>Amnt</b>	<b>LastOrder</b>	<b>Amnt</b>
Impressive Progressive								156			11/18/03	156
World Wide Importz	704	4,082	480%		1,818		2,110		2/18/03	2,110	1/18/03	2,110
<b>Totals:</b>	<b>2 Lines</b>	<b>704</b>	<b>4,082</b>	<b>480%</b>	<b>0</b>	<b>1,818</b>	<b>0%</b>	<b>2,110</b>	<b>156</b>	<b>2/18/03</b>	<b>11/18/03</b>	

Sorting by postal code, city, or order amounts will suggest the sequence of where to go. If there are more stops than she can make during her trip, the report is sorted in descending order by the dollar volume purchased. This latter choice allows her to confirm that her best customers have been recently contacted with appropriate follow-ups and may not need to be visited on this trip.

Prospective customers: She prints a report to show customer opportunities with a listing of prospective customers, the date that the agency began tracking them, contact names, notes, and the number of times that they have been contacted. A *Communications Journal* may also be printed detailing communications with any one prospective buyer.

**Targeting what to sell - Existing customers:** She prints an *Item Sales Totals* report as a barcoded order guide for each customer using their item sales histories. It shows by line (vendor) what has been ordered, on how many orders, average or last cost, their last order date, sorted by relative importance. A column is provided for the reorder quantity.

Qty	ItemNumber	Units	Product Name	Orders	Qty	Extended	LastShip
<b>World Wide Importz</b>							
	2200		6 Wooden Ladle	1	20	600	2/18/03
	52822-2		12 Ital Bean & Peasta Soup	3	36	535	2/18/03
	52820-7		12 Toffees	3	18	216	2/18/03
	57001		1 Cheddar Mouse	3	54	189	2/18/03
	52828-1		12 Carrot/Onion/Chickpea S	1	10	149	12/5/02
	52821-0		12 Mediterranean Tomato Sp	1	10	149	12/5/02
	52820-7		12 Carrot Butterbean Soup	1	10	149	12/5/02
	10248-9		Crespi Salsina	2	2	123	1/12/03

New and existing customers: She prints an additional, *Item Sales Opportunities* catalog so that she can sell *deep* into her accounts that are already buying these

lines. This barcoded catalog includes color pictures of items that they are not buying, have had proven success nationally or within the territory, and are from vendors with whom they already have an established relationship.

Two more reports that she may want to print are a *Promotions List* that includes date ranges and pricing and the *Vendor Sales Totals* ranked by her best selling line to the least. The latter report will be for her to use as a resource for recommending lines.

### **At the sales call**

**Visual inspection** - While waiting, after arriving a little early, our rep walks through the store with her order guide in hand. Knowing what has been ordered in the past and comparing it to what is on the shelves, she uses the guide to create a recommended reorder for each of the lines to assure that the customer does not run out of popular merchandise. If the manufacturer is providing electronic invoice information with line item detail, she will even know what is on backorder.





**Writing the orders** - When the customer is ready, the rep is ready to make the most of their time together. She can propose what reorders may be needed and pending the customer's authorization, she can scan the order from the order guide and leave that copy with her customer.

As items are added to the order, our rep is prompted regarding items that may not be available at the requested ship time. This reduces the accounting costs associated with back orders and empowers the rep to sell items that are in stock.

If volume level or promotional pricing is applicable, the rep is automatically prompted to allow these price adjustments. Pending her approval, each discount is expressly noted on the order.

**Recommendations** - Our rep presents her *Promotions List* and *Item Sales Opportunities* catalog of top selling items within the lines being purchased for her customer's review.

<b>North Winds Brokerage</b>		<b>Impressive Progressive</b>										
Box 1313 Pleasantville KS 10100-1000 300-555-5555 Fax: 300-666-6666 service@nwinds.com		<b>Wholesale Price List</b> <b>Sorted by Product Name</b> Tuesday, November 18, 2003										
<b>Promotions</b>												
Product Nam	ItemNo	Qty	UPC	Units /Cs	Begin Date	End Date	Pack Size	Unit Price	Promo Begin	Promo End		
Tri-Widget	4D		0000044444	1	1/1/03	9/1/04		4.00	3.50	11/1/03	12/31/03	
Widget	1A		0000011111	1	1/1/03	9/1/04		10.00	9.00	11/1/03	12/31/03	
Item Count: 2												

<b>North Winds Brokerage</b> Box 1313 Pleasantville KS 10100-1000 300-555-5555 Fax: 300-666-6666 service@nwinds.com		<b>World Wide Importz</b> <b>Distributor Price List</b> <b>Sorted by Product Name</b> Tuesday, November 18, 2003 <b>Top 10 sales rank</b>							
Product Name	ItemNo	Qty	UPC	Units /Cs	Begin Date	End Date	Pack Size	Unit Price	
<b>Toffees</b>	<b>52820-7</b>		074691040423	12	11/1/03	12/31/03	12 15 oz	12.00	
Great impulse item by register									
Category: Candy MinQty: 6 InStock: 20 OnOrder: 10 Rank 5									
<b>Reggiano Parmesean</b>	<b>57002</b>			1	11/1/03	12/31/03	1 20kg	7.00	
20kg									
Category: Cheese MinQty: 1 InStock: 20 Rank 10									
<b>Cheddar Mouse</b>	<b>57001</b>			1	11/1/03	12/31/03	6 ea	3.50	
Merchandise with cheese items in gourmet									
Category: Cheese MinQty: 1 InStock: 15 OnOrder: 15 Rank 10									

Pleased by her efficiency, her customers frequently add these items to their existing orders.

She goes on to recommend popular new lines from the *Vendor Sales Totals* report. She can state "This is my most popular line" without revealing actual sales figures. This broadens the agency's sales to the customer. She provides a copy of the *Item Sales Opportunities* catalog for the new line.

Before leaving, she asks the customer what information may still be needed such as an electronic price list to import into their point of sale system or electronic copies of their orders. She checks to see if they would like any new catalogs mailed and when would be the next time available for an appointment? The details are noted in the *Communications Journal* of our rep's software and automatically updated in her Microsoft Outlook calendar.

<b>North Winds Brokerage</b> Box 1313 Pleasantville KS 10100-1000 300-555-5555 Fax: 300-666-6666 service@nwinds.com		<b>Communications Journal:</b> Kennedy,Sheila				
		<b>For the Period:</b> All				
		Tuesday, November 18, 2003				
Name	Date	Type	Note	Follow-Up	Reminder	Hyperlink
Sheila Kennedy	10/18/03 7:57 PM	Letter		11/3/03 8:00 AM	<input checked="" type="checkbox"/>	
Li'l Shop of Hors D'oeuvres Sent catalog, call for seasonal order						
Sheila Kennedy	8/1/03 7:57 PM	Excel			<input type="checkbox"/>	
Li'l Shop of Hors D'oeuvres e-mailed price list in Excel format						
Sheila Kennedy	6/21/03 8:12 PM	Meeting			<input type="checkbox"/>	
Li'l Shop of Hors D'oeuvres Xmas pre-order						

**Printing the order** - The rep has a variety of options for providing order copies to the customer:

- Totals may be copied from the rep's hand-held or laptop to the pre-printed order guide.
- Using a portable printer, the order may be printed directly from the PocketRep™ device without another computer.
- The order may be printed directly from her laptop.
- The order may be printed to the customer's fax via a wireless modem (Pocket PC or Laptop).

Customers appreciate the value that the rep brings to the transactions with her recommendations and efficiency. They respect that her intuition is supplemented by the credibility of her objective reports. They are also reassured that her follow-ups are scheduled and that she has provided them with the best pricing available.

### ***After the call***

**Get the orders in** – Our rep can use any connection to transfer her orders either to the agency, the manufacturer, or the customer. Orders may be faxed individually or in batch to customer or vendor. Faxed orders include a cover sheet with a synopsis of the orders that are attached listing who the order is with, the quantity and amount ordered.

The orders can be synchronized on the Internet to the agency and, if needed, sent to the manufacturer from the agency. Orders may be sent in electronic format to the manufacturer and can go directly into their systems without re-entering data.

**Follow-up, follow-up, follow-up** – Our rep is prompted for follow-ups based on the appointments previously scheduled within the program. Tools such as the "Last ordered on or before" filter on the *Customer Snapshot* report show her which customers may be falling behind in their ordering. This same report can be used to show which customers ordered particular lines during the same season a year ago that haven't ordered for the same season this year.

Comparative sales reports show her comparisons for order or invoice amounts by her choice of month, quarter, year, or season.

Her day is done. <http://www.brokerforce.com/FAQs/Value-AddedRoadTrip.htm> for how to generate the reports in this outline.

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