

ELECTRO
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CANADA



Best Practices: Branch Visits with Manufacturers and Agency Reps

Best Practice document developed by EFC's CMG Committee

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Pre-Call Planning

The rep and manufacturer should review the branch background information and determine the objective of the branch visit and the rep should make appointments with the appropriate decision makers related to the call objectives. Appointment setting must include any requirements for AV equipment etc. that is needed.

Both parties need to agree on what type of prep is needed: reporting/presentations/samples/literature, etc.

Whatever the objective(s) are, the manufacturer and rep must present a unified front. The local representative is responsible for nurturing and strengthening the relationship with the distributor and is the face of the manufacturer in the local market. The local rep should therefore take the lead or be the conduit for discussions during the call.

Branch Background

The Distributor

- Are there current opportunities/initiatives/objectives that this distributor is focusing on?
- Are there any issues/pain points for this distributor's business?

The Business and Performance

- **Business plan:** Is there one? If yes, what is the status of the plan and execution?
- **Sales performance:** Current year vs. previous. Performance towards goal?
- **Branch ranking:** How well does this branch do with your product category in the territory?
- **Share of shelf:** What is your share of shelf with this product category?
What other competitors occupy this branch's shelf space in your category?
- **Margin performance:** Is the distributor & manufacturing happy with the margin performance?
- **Inventory:** Are the turns acceptable? Is the mix acceptable?

Marketing and Training

- **Merchandising:** Are products properly displayed
- **Promotions:** Status of current promotions?
- **Training:** Type and timing of training? Satisfaction with branch knowledge/expertise on your products?
- **New product success:** Status of recent product launches with branch?

Joint Calls: Success of joint call activity?

Relationships: Any issues?

Branch Visit

Objectives

Select all that apply:

- ☐ Develop business plan
- ☐ Review branch performance
- ☐ Introduce new product/program
- ☐ Increase share of shelf
- ☐ Improve project performance
- ☐ Service/relationship recovery
- ☐ Relationship building
- ☐ Meeting new staff/influencers
- ☐ Branch maintenance:
 - check inventory
 - check merchandising
 - review issues and opportunities
 - check promotion performance
 - check sales performance

What is our Value Proposition? (What's in it for the distributor?/Depends on objective)

- What problem are we addressing?
- What does success look like for the distributor?
- What is our core capability of the (rep/mfg) team and our competitive differentiator?

Branch Visit Plan

Timing/logistics of visit: Length of time, number of branch personnel involved.

Contacts	Role	Objective	Time allocated
Jane Doe	Branch Manager	Review Performance	1 hour
John Smith	Counter Supervisor	Review Merchandising	15 minutes
Jim Mills	Purchasing Agent	Check inventory	30 minutes

Roles by Objective

1. Who is going to take the lead: Introductions/establish context/confirm agenda and timing?

Since the rep owns the distributor relationship, the rep should take the lead

2. Who will be asking the questions/making presentations/reviewing reports?

- This will be based on the specific objective of the call
- The roles can be shared

3. What topics should be “off the table”/not discussed?

4. Who will be summarizing and identifying next steps?

This should be done by the rep as the rep owns the execution and relationship with the distributor

Branch Follow-up Plan

- Set actions/accountability/timing
- Document meeting details
- Set up review meeting