



We simplify field work.

Best Practices for Mobile Field Reports

The Art of Collecting Data

Field-based organizations depend on their field reps to gather crucial market information for them. From regional statistics to client and competitor reports, the wealth of information assists organizations in making more insightful, data-driven judgments. Before the emergence of software solutions, businesses were limited in the amount and quality of information their reps could collect since reps had to collect information on paper and later manually re-enter it into spreadsheets. The antiquated system of data collection was costly, inefficient, and prone to error. Fortunately, field organizations now have software solutions available to them that expedite data collection and sharing.

Field Activity Management solutions provide field organizations the ability to develop custom reports for individual businesses' needs. Some of the most common reports developed by these field organizations are merchandising reports, promotional reports, and competitor reports. This Best Practice Guide will walk field managers through the essentials of each form and the actionable insights that can be gained from each of them.



The Merchandising Report

The Essentials

For field organizations working within retail arenas, merchandising reports are highly insightful. Merchandising reports provide businesses with information regarding the conditions of their products on the shelf, such as the amount and quality of shelf space, inventory levels, and more. It allows your reps to consistently track and avoid the dreaded out of stock issues: when your product goes missing from the shelves, your brand [takes a big hit](#). Not only is the consumer unable to purchase the product, it may lead to a [Product Void](#), which occurs when the retailer fill up the empty space with another substitute brand.

For a successful merchandising report, here are some examples of essential information that should be collected in the field:

- **Product Availability:** Are your products available on the shelf vs. in the back room? Record the stock across all product ranges.
- **Out Of Stock:** Which products are out of stock? How often does this occur?
- **Units Ordered:** How many units did you order?
- **Retail Price:** What is the everyday price? How has it fluctuated since the last time you checked in? And is it in compliance with the contract?
- **Discounts:** Is your product on promotion? How long is the discount duration?
- **Quality of Merchandising:** How does your product look on the shelf? How organized/disorganized in a scale of 1 – 5?
- **Communication with the Retailer:** Did you negotiate any more placements in the store? What are the sales potential in this retailer? Did the manager have any comments?
- **In-Store Activity:** What did you accomplish today? What other services did you provide?



- **Photo & Signature:** Obtain the signature of the retailers to sign off on the work you did in-store.

Merchandising Report
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Client	CVS
Address	714 Atlantic Ave Boston
Representative	Marie Mckenzie
Description	Merchandising Report

Grape-Splosion

Is the Grape-Splosion available?	no
Is Grape-Splosion out of stock?	yes
Units of Grape-Splosion ordered	8
Is Grape-Splosion discounted? (duration and type)	1.99 discount
Quality of Grape-Splosion Merchandising (Scale of 1-5)	5 (Excellent)
Managers Name	Christine
Did you ask for additional placement?	yes
If yes, explain location and amount	She told me about how we can start doing pop displays in June

Photo of Grape-Splosion

What additional activities did you
perform?

Straighten stock, presented new
samples of orange soda.

Signature

Actionable Insights

One of the most common challenges facing managers of remote field teams is the lack of visibility of field activity. No matter how organized and extensive an organization's [onboarding](#) and training programs are, once reps are in the field, they make their own decisions; they decide whether or not to fix a shelf facing, or if they should put pressure on a retail partner who isn't living up to their contractual obligations, etc.

Since managers cannot be physically present with the reps at all times, the only method of gaining visibility in the field is through merchandising reports and audits. Therefore these reports are crucial to your organization's success. While field reps are responsible for filling out these reports to the best of their abilities, it is the manager's responsibility to develop a simple, standardized process for collecting data in the field.

With a Field Activity Management solution, back office managers can develop custom reports that reps can access and complete on their [mobile phone or tablet](#). They can easily answer each of the assigned questions through drop down select options or custom text fields and can even take photos of their work. Retail managers can then provide their signature upon completion of the form. Afterwards, all the data will be automatically shared with managers through cloud technology.



The Promotions Report

The Essentials

Some field organizations, especially those in the food and beverage industry, hold numerous promotional events, such as tastings and samplings, in the field. And often times these smaller scale events could be difficult to track and measure. However in order to determine your return on investment for these promotions, you need to collect data consistently. For managers looking to create a Promotions Report, here are some examples of the essential information you should include:

- **Promotion Type:** Is it a sampling, tasting, or demo? Or are you at a tradeshow? Measuring different types of promotions will help managers determine which types of promotions are most effective.
- **Event:** What was the occasion? Was it a holiday?
- **Duration:** An eight-hour promo may produce very different results than a two-hour promo. Measuring the difference will help managers allocate their resources effectively.
- **Products:** What was being sampled? How many units of it?
- **Position:** Just as the duration will produce varied results, so will the store position in which the promo takes place. Track this for more successful future events.
- **Number of Employees:** Measuring this will help managers determine the appropriate number of reps for a promotion.
- **Effectiveness:** What was your beginning & ending inventory? How many total units were sold due to this promotion?
- **Photos:** Attaching photos of the event helps managers visualize the event more effectively



Actionable Insights

Taking records of all promotional events, either small or big, will prove to be beneficial for the future. There are some organizations, however, that substitute in the field reporting with in-person meetings and conversations over the phone, where reps can discuss their impressions and evaluations of the promotion.

There are two key issues with this approach. Firstly, you run the risk of receiving a biased report. Individual reps may be inclined to present only the positive aspects of the event because they feel that their performance is correlated to the success of the event. Secondly, personal impressions do not equate hard data. It is always more difficult to evaluate qualitative data over quantitative.

Nonetheless product promotions are difficult to measure since the effects may be longer term. Your promotions may not have generated a lot of sales at the time but may have been fantastic for brand awareness. But as you accumulate more data over time, it will be clearer to you which promotions were more effective than others.



The Competitive Report

The Essentials

So far, the reports we have discussed are common reports used by organizations in the field. One underutilized form for field organizations is the competitive report. Keeping track of competition is a necessary function for any organization. For managers, while an online resource may give you a general idea of who your brand is dealing with, the best resource comes from the data your reps collect in the field. Here are a few examples of what you should include in your competitive report.

- **Identifying Competitors:** Who are your biggest competitors in this location? Which items are they successful with?
- **Competitor Price:** How does your competitor's pricing differ with yours? Differences in sales between brands could be a result of strategic pricing. Collection of this data will help managers determine price per territory.
- **Competitor Promotions:** Do they have any promotions or events? What's the duration? Promotional activity by competitors should be tracked and matched if necessary.
- **Competitor Photo:** This documentation will show merchandising efforts and packaging design by competitors.
- **New Competitor Threat:** Your rep may notice a product that is similar to yours that could be a competitor. The addition of a note section here could allow the rep to substantiate their concerns.
- **Indirect Competitors:** Who are they and what are they doing right?



Competitor Report

Client	CVS
Address	714 Atlantic Ave Boston
Representative	Marie Mckenzie
Description	Competitor Report

Identify Competitors at location

Name of Competitor 1	Jazzy Juice
Price of Competitor 1	1.20
Photo of Competitor 1	
Name of Competitor 2	Mama Ann's
Price of Competitor 2	1.50
Photo of Competitor 2	
Please list competitor promotions in the store	Pure Nectar had a buy 3 get 1 free promo.
New Competitors?	Not since the last visit.

Actionable Insights

Competitive data allows managers and business owners to check trends in the industry real-time. It provides insight on a micro, in-store level. For instance, after much competitive analysis you find that in Boston, CVS end cap displays are the most coveted place to be among beverage brands. It also delivers macro insights; such as learning that your beverage competitors are all experimenting with coconut water.

Additionally competitive pricing is another important attribute of competitive reports. Pricing, itself, is a delicate art and science. If your competitor that has a similar value proposition as yours and recently lowers their price, you need to be aware of it. And the only way to collect this knowledge in real time is through your field reps. While it is important not to be obsessive about competition, keeping a close eye is an absolute necessity in retail.

Future of Data Collection

As discussed before, it is incredibly challenging for field organizations to bridge the gap between the back office and the reps in the field. The only instrument to close the gap is through collecting data in the field. Therefore, business owners and managers should strive to optimize their data collection process for both their employee's benefits and theirs. And with Field Activity Management, you can start simplifying your data collection, which will help your business make the right strategic decisions to succeed in the competitive landscape.



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