



Field Marketing Study Guide

Guide to helping you master Field Marketing

Field Team Academy

Empowering field teams to win at retail

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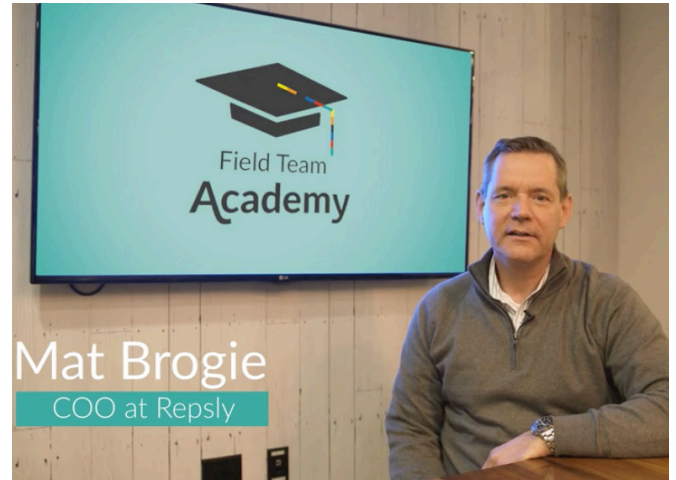
Course 1: Introduction to Field Marketing

Learn the basics of field marketing: including typical goals and event types.

Summary of Video Lecture

What is field marketing?

Field marketing refers to a brand's effort to get their products in front of consumers in person, whether that's at stores where the product is sold, at events, on college campuses, or simply out on the street. In these settings, field marketing teams have a chance to engage with buyers one-on-one. Typical field marketing goals are to improve brand awareness, boost sales at targeted locations, and increase engagement at the local level.



How do field marketers interact with consumers?

The most common way is to hold a product demonstration. For food and beverage brands, these usually take the form of giveaways, where field marketing reps offer free samples to shoppers out at the store. Another type of field marketing campaign is direct selling, when brand reps are focused on making sales directly at the point of interaction. Brands often pair direct sales campaigns with product demos, capitalizing on consumers' interest after trying the product. Other field marketing events focused on direct sales include pop-up shops and promotional tables at events.

What are retail audits?

Retail audits tell brands if their marketing materials and signage are displayed properly where their products are sold. Often, field marketing teams will perform a retail audit as part of their store visit for a product demo or sampling event.



Matthew Brogie

With 15 years of experience in the mobile technology sector, Mat has designed and implemented mobile retail execution solutions for some of the world's largest CPG companies. In his role as COO at Repsly, Mat stays close to the latest Retail Execution and Field Team Management processes used by CPG companies large and small.

Course 2: Who's who in Field Marketing

Discover the roles, goals, and responsibilities that accompany typical field marketing job titles.

Summary of Video Lecture

What do field marketing managers do?

Field marketing managers plan and set goals for events, and are responsible for making sure every field marketing campaign hits those goals.

Field marketing managers also decide how their brand image should be reflected out in the field.



On a day to day basis, field marketing managers work with their team to improve their efficiency and effectiveness at every event, and help them maximize their ROI. Field marketing managers are also responsible for reporting on these initiatives to senior management.

What is a field marketing representative?

Field marketing representatives are the ones hosting events and interacting with consumers out in the field. For the most part, field marketing reps are generalists - they may conduct product demos and retail audits, or sell products directly to customers at shows and events. Their primary goal is to drive brand awareness and make consumers excited about the brand and love its products.

To pull all of this off, field marketing reps are typically very outgoing and engaging, and their personal brand should mirror that of the company they represent.

What is the role of a brand ambassador?

Brand ambassadors are people who are paid to promote, endorse, or otherwise represent a brand or product. Big companies often recruit celebrities to serve as the face of their brand and promote their products to their personal fans.

Most companies, however, don't have that kind of cash. Instead, they identify and recruit their brand's biggest fans through social media or at field marketing events. As brand ambassadors, they agree to promote the company on social media and within their circles of influence in exchange for free or discounted products.



For the most part, field marketing reps are generalists - they may conduct product demos and retail audits, or sell products directly to customers at shows and events. Their primary goal is to drive brand awareness and make consumers excited about the brand and love its products.

What does a company's street team do?

Street team reps are a brand's vocal champions, both during official events and through their own social promotions efforts. During events and guerilla marketing campaigns, brands might tap their street team to serve as their "boots on the ground" - handing out fliers, stickers or products to crowds.

While every company might call its team members something different, these are the core roles that make up most field marketing strategies.

Course 3: Who Field Marketers Work With

Learn exactly who you need to work with to put together a smooth field marketing event.

Summary of Video Lecture

Field marketing is naturally collaborative. Hosting a product demo or marketing at an event involves a lot of moving parts, so having solid relationships with the vendors, retailers and venues you work with will make your life much easier.

What vendors should I reach out to before a demo?

One of the most important vendors you'll want to get to know is one that sells branded merchandise. Because, in addition to the product itself, it's a good idea to hand out fun stuff branded with your logo, like T-shirts or koozies. By building a relationship with a single vendor, you might be able to qualify for big order discounts.

Similarly, get to know your sales rep at the vendor where you purchase signs, posters, and other promotional material. It's much more convenient when that person is just a phone call away, and you don't have to spend your time going back and forth over email to get what you need.

Finally, make sure you build a relationship with your manufacturer or sales team, since they're the ones who will be able to send you the product you need for the demo

Who else should I get to know?

You'll want to get to know the management team at the stores where you do demos. A strong relationship goes a long way when it comes time to schedule a sampling event, especially if you need their help dealing with any problems the day of the event. Plus, shelf share.

Finally, make sure to put the time in to build a good rapport with your manager. It can be tough to get to know them when you spend most of your day in the field, but it's worth the time.

Having a good relationship will make it easier to build trust, which is critical for dispersed teams. Plus, open communication will give you more chances to learn and improve on the job!



Course 4: Building Strong Retailer Relationships

Learn how to develop relationships with retailers and grow your brand's presence at retail

Summary of Video Lecture

What's the most important thing for field marketing reps to keep in mind as they learn to work with retailers?

First and foremost, having a recognition that a retailer's store is their place of business is extremely important. I was a retailer; I owned a store for a long time. The fact that 50 different sales reps and merchandisers and delivery people are walking in and out of their store everyday is something that's very important for a rep, a marketing person, a sampler, or a salesman to understand is critical.



So the cardinal sin is to walk into the door and walk right to your own product to see what you look like or to start touching the shelf. Because, frankly, that store is that retailer's business and it's not your place to go and touch the shelf without speaking to the retailer first, shaking their hand, introducing yourself, and then asking permission to go look at the shelf and see what's going on in their store.

I always tell people to walk in the door, go and find the business owner, present yourself in a very nice way; introduce yourself, your company and then, with permission, go either start looking at the shelf or merchandising the shelf. I think that's very important for anyone who's walking in and out of stores. It earns you a lot of respect and it sort of sets the tone for the work you might do that day in the store.

How can field marketers take their store visits to the next level?

The second thing I think that's really important with respect to making a call is having a sense of recognition of what's going on in a store. If you've been selling long enough, if you've gone in and out of enough stores, you learn



Tom First

Tom First is an Operating Partner at Castanea Partners, where he focuses on opportunities in branded food and beverage. Before moving into the investment space, Tom co-founded Nantucket Nectars, an award-winning juice company which sold to Cadbury Schweppes PLC in 2002.

“ Learning the lessons and understanding the environment you’re in and the person you’re dealing with immediately, as quickly as possible, and even before you might go over and introduce yourself, is a really valuable way to begin a selling process.

ways to recognize an environment. And by recognizing an environment, you then learn how to communicate with that retailer.

For me, over many years of doing this, there were many cues that enabled me to understand what type of retailer I was speaking to. Examples are looking at pricing, looking at product selection, looking at how the shelf is merchandised, cleanliness, etc. If you keep an eye on these factors, you can learn about 85-90% about that retailer and that store within three minutes of walking through the door.

A store that’s meticulously cleaned should tell you that if you’re about to set up a sampling in the store or do a demo, you better be careful about where you are in that store, how you treat their store and their products, how

clean you are, how important it is to clean up when you’re done.

I knew that if stuff was a mess that I could go redo their whole shelf and take a bunch of shelf space. But I also knew that if stuff was meticulous then this was a retailer who was going to be very hard for me to move stuff around; I was going to have to work hard to get an extra slot or an extra shelf. So developing those recognition patterns will help you approach the retailer the right way the first time, rather than making a mistake. Because one mistake with a retailer, pushing them too hard or using up too much of their time, can destroy the entire account call or could destroy your entire day.





How can field reps for emerging brands work to get their products into new accounts?

As a new brand, you should quickly look around the store to see where your product would fit in, what other products there are in your category, or opportunities you see on the shelf that could be in your category but differentiated from what you're trying to sell.

And then maybe another thing to do is to look around and see in other categories outside of the category that your product exists, to see if this is a retailer that seems to bring in emerging-type brands or new products.

So, you'll understand how difficult the battle is if you're walking into a store and seeing all sort of main-line, big-company products as opposed to walking into a store where perhaps they have tried some newer products in another category, because that could be a great thing. If you know that a new product, for example like Kind Bar, came in and competed with the typical bar products in the account, and you're a beverage company walking in, you can say something like, "Hey look, I'll bet when you first brought Kind Bar in here you didn't think it would do much. But look at how much it's helped your business".

And the first people that brought in a product like that looked like innovators. You sort of make a retailer feel good about being the leading retailer to bring in something that's doing well. I always like to use an example of other stores that have brought you in and been successful.

At Nantucket Nectars the first people who ever brought in the product in the Boston area or around Nantucket or in Washington D.C. were always proud that they had been sort of the pioneers of Nantucket Nectars. In fact, to this

day they still talk about it. So that's an opportunity to present to a retailer.

But again, analyze the store. Understand how this retailer sees if you're in the beverage category/the beverage industry, and look at how they have brought in sort of innovative products in different categories, and see whether there's an opening for you.

How should field marketing reps approach retailers to increase their brand visibility?

When you're walking into a store and you're looking to either expand your positioning or get a better shelf, one way is to help retailers optimize their existing stock on the shelf.

Help store managers find ways to get rid of products that aren't selling quite as well in their store and then give them the opportunity to put your product in the store that might be selling better than that product.

If you've got time, offer to help organize their shelves a little bit better, either based on category or flavor type.

A lot of times I would walk into stores and see shelves where there was coconut water here and coconut water there, or sports drinks here and here and here, and I would literally offer to redo their entire shelf set so that all the products were in the right place. In doing so I would somehow find an extra shelf or two for my product.

Offer yourself up as a consultant to the retailer. One example I used to give a lot to retailers was, I used to tell them - I'm giving away trade secrets right now - that their shelves were basically apartment buildings that they were renting and the products on the shelf were tenants paying rent. But just being on the shelf was not paying rent, that was squatting. Coming off the shelf was paying rent.

Honestly a lot of retailers weren't thinking that way. They were thinking about what they bought to bring in rather than about how quickly it was moving off the shelf. And when you start to explain to them that they're a landlord, and they're being paid by how quickly stuff moves off their shelf, they start to think about how to get the stuff off their shelf that's not moving as quickly and to expand the shelf space for products that are moving quickly. Hopefully, your product is moving quickly and you deserve to be on the shelf and help them pay the rent.



Course 5: Organization in the Field

Discover the benefits and best practices to organizing your activities and data out in the field

Summary of Video Lecture

Reps who practice staying organized leave very little up to chance, and therefore experience few surprises that will throw them off-track. Because of their organization, they always have quick and easy access to the resources they need at the time they need them, which significantly raises the likelihood of success.

What are the fundamentals of organization?

Being and staying organized relies heavily on planning:

- Identifying the resources that you'll need
- Anticipating potential issues that you may run into,
- Co-ordinating with other people in and outside of your team that will be responsible for different aspects of your success

...and then on execution:

- Making sure that those resources will be available to you at the right time
- Developing contingency plans for any potential issues
- Ensuring that anyone else that is responsible for participating in your success is informed, available and capable of doing their part.

How can reps start the process of getting organized?

The best way to start becoming organized is to find the way that works best for you to take and refer back to notes. This can be carrying a notebook or journal, using a task manager app on your phone, or keeping an online folder of documents that you can access at any time. The important thing is to find the method that works for you. If you



Mat Brogie
COO at Repsly



Matthew Brogie

Matthew Brogie is the COO of Repsly, and a long time mobile technology consultant. With deep experience designing and implementing mobile retail execution solutions for some of the world's largest CPG companies.



Just remember that organization is a skill that you have to practice. Find the tools that work best for you to store and retrieve information, and create a system of planning, checklists and control. Learn from your process and keep improving it. Before long, being highly organized will be second nature and take very little time to maintain.

have a simple and easy to use method for recording and referring to information, then you can build a system for staying organized.

Here is a simple framework to help you get started:

1. Plan ahead, and visualize. Think about what tasks you have coming up, and visualize yourself doing them. Take inventory of the environment where the task will be done, all of the tools or equipment you'll need to be successful, and any people that will influence your ability to be successful.
2. Make Checklists! These can be mental checklists, but you're better off to write them down on paper or using an app. It can be as simple as a notepad on your phone, or task list in your calendar. Start with the big picture: the basic facts of who, what, when and where, then add the resources that you'll need. Finally, add details to your list about what needs to be done to make sure those resources will be ready and available for you.
3. Take control of things that might be out of your direct control. Confirm with people that control the resources that you need that those resources will be available for you, and make sure that any other people that need to take actions know exactly what is expected of them. This should be a checklist item!
4. Have contingency plans. If there is a risk that some resource (including people resources) may not be available, have a back-up ready to go.

What does this look like in practice?

Let's say that you have to do a demo of a new product at a supermarket that you've never been to. How can you get organized around this event to make sure you will be successful?

First, plan ahead and visualize. Imagine what the set up looks like, and where it is in the store. If you don't have any idea what to expect, ask someone who does. Either someone who has done it before, or someone who assigned the job to you. Think of similar environments that you have been in; if you have notes from a prior demo at a store in the same chain, review those. Make sure you can visualize what the environment and process will be like. Think about who will influence your success: the store or department manager where you'll be conducting the demo, the person who will send the product samples to the store, the person who gives you the table, branding materials, and any

equipment.

Make your checklists. Confirm the exact location and time of the demo. Find out how long it will take to get there, and plan for setup time. Make a list of all of the things that you'll need: Table, Branding Materials, Product, plates/cups or napkins, Equipment like a hotplate or a cooler. Include environmental things like an electric outlet and extension cord, water or ice. Make sure you know how each of these things will be made available to you if you don't already have them in your control.

Take control! If you have never been to the store before, call the department manager and make sure that there is an outlet, or ice available. Confirm that they know you'll be there for the demo! Reach out to anyone responsible for delivering other resources to you and confirm that they will be available.

Think about what could go wrong, and what resources could be missing and make a plan B. For example, you may want to know how to quickly get a replacement hotplate in case yours malfunctions.

Before the event, go through your checklist to make sure that everything is accounted for and taken care of.

As important, after the event take note of anything that didn't go according to plan and determine what you could have done to prepare for it. Keep your notes from the event in some easy to access place, like your calendar, a notebook or an on-line document of some kind. Include names, email addresses and phone numbers of anyone you've dealt with, as well as any special circumstances about that particular event, like the availability of an electric outlet or particularly busy consumer traffic. All of these things will make the next demo much easier to plan for.

Do you have any last words of advice for reps trying to organize the way they work in the field?

Just remember that organization is a skill that you have to practice. Find the tools that work best for you to store and retrieve information, and create a system of planning, checklists and control. Learn from your process and keep improving it. Before long, being highly organized will be second nature and take very little time to maintain.

Course 6: Executing the Perfect In-store Demo

Learn how to plan and execute a product demo that will excite shoppers

Summary of Video Lecture

Product demos are important, especially to new brands. They help your product stand out and allows you to connect with your consumer and humanize your brand.

How should field marketing representatives set up and prepare for their demos?

First thing you're going to want to do is call the store. I'd call about two weeks before you'd like to run the event to give both sides time to plan.

Next, you're going to want to connect with your sales team. They're the ones who will be responsible for making sure you have enough product on-site to support your demo. So be sure to tell them exactly when and where the event is taking place, as well as which SKUs you'll be sampling.

Some of the things you may to prepare to bring with you are:

- your brand kit
- trash can
- a hat
- non-latex gloves.



What should happen on the day of the demo?

On the day of the demo, make sure to call the retailer and confirm that your demo is still on. You want to plan to arrive at least 15 minutes early. Once you get to the store, I like to check in with customer service so that you can be connected with the proper department. Once you arrive to where the magic will happen, you're going to set up your brand kit. Plus, make sure you know where the product is in-store so that you know where to send your consumers.



Kathryn Berta

As the New England sales manager for Health-Ade Kombucha, Kathryn works with distributors and retailers to get Health-Ade in as many accounts as possible. Her role also includes coordinating in-store promotions and training brand ambassadors on best practices for product demos.



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How can field marketers make sure their events are successful?

Here are four quick tips for being the best brand rep you can be.

1. Get store employees to try your product. Remember, they'll be the brand reps when you're gone.
2. Know your product. Your label is your best friend.
3. Say your brand name, rather than the product type. For example, I like to say, "Would you like to try some Health-Ade today?"
4. Follow store guidelines. Some stores are really strict on wearing non-latex gloves, wearing a hat, or having an allergy info card. Make sure you're following the rules.

What steps should field marketers take after their events?

After the demo, first count how many samples you have. Next, make sure the product looks good on the shelf before you leave. Then, write down some memorable customer feedback. Both positive and negative will help the company. Lastly, send your manager a timely recap so it's fresh in your memory.

Course 7: Collecting & Analyzing Field Data

Find out what data you should be collecting in the field and how you can analyze your field data

Summary of Video Lecture

Why is it important to collect data out in the field?

Essentially you're in the field to collect facts, and without proper representation of these facts, all these activities can become meaningless. We also use data to answer questions we have, and to find important conclusions. These conclusions that we find are what will further guide our future decisions, and provide us with more confidence in our decision-making process



What is the difference between good and bad data, and why is it important to have good data?

When compiling data, it is extremely important to be accurate and complete. Teams need to objectively evaluate the data for what it is, not what we want it to be or hoped it would be. The only way to do this is to have consistency across all field visits with all reps, so that every piece of data is being evaluated the same.

What kind of metrics should managers track relating to their products?

On Shelf vs not on shelf? Where in store? In shelf set planogram? Additional placements in store? SKUs on shelf? Units packed out? Case/unit velocity/week? OOS, or other issues?

What kind of metrics should managers track relating to their team performance?

Date/time, Location, Scheduling, Store Contact, Consumer Feedback, Units packed out, Additional placements



Jeremy Leblanc

As regional sales manager at UNREAL Candy, Jeremy Leblanc is in charge of increasing brand visibility and sales at retail locations throughout the country. He works closely with UNREAL's field sales team, as well as a third-party brokerage, to not only land new accounts for the brand, but to ensure UNREAL is presented well on the shelf wherever a shopper might see it.



Retailer data is great because it provides high level macro information about your product. But as a team, what you might be more concerned with is the detailed, day-to-day data that your field reps collect.

How can brands get their hands on data about their company and team?

Data can really be mined from two sources: either from the retailer, or from the field reps. Retailers encapsulate the high-level data, essentially sales. What velocity is your product moving at? How much product is getting packed out a week? Are your distributors getting shipments there on time? Things like that.

How can brands get their hands on retailer data?

There are a few different ways to get data about retailers. The first is from distributors. Although they're not directly retailers, they're involved because they're the ones shipping the products to the retailers. From this, distributors get a lot of data, which you could use to estimate sales.

For example, a smaller mom and pop shop might not track their sales on a weekly basis, but your distributor knows exactly how many cases went to that store in a given week. If you know what's on shelf there, you can calculate exactly what has been sold. Often times, large retailers keep track of sales data themselves, and can give you access through their sales portal. This scan data is extremely accurate, and can give you a precise picture of exactly what has been sold each week. Finally, you can collect feedback from retailers through your field reps. While it might not be as objective as scan data from the retailer, you can find out how people feel about your brand at the store level.

How can brands collect and organize data from the field?

Retailer data is great because it provides high level macro information about your product. But as a team, what you might be more concerned with is the detailed, day-to-day data that your field reps collect. In our case, when collecting data out in the field, we want to make sure all of our reps are being consistent and honest so the data they collect is as accurate and useful as possible.

How can managers use data to shape their strategy?

They can use the insight they pull from their data to delegate resources on a daily and weekly basis, and make confident decisions for the betterment of the company. Ultimately, data is the key to an efficient and effective sales team. And by collecting good data, and using it properly, you can be more successful in the field.

Course 8: Best Practices for Communication

Explore ways to bridge the gap of distance and build a team culture

Summary of Video Lecture

What are some challenges remote teams face in communicating effectively?

I find that one of the biggest types of communication challenges is around people understanding, because in-person communication has a whole additional level of depth and subtlety to it, versus phone or text or email communication. So one thing I would recommend that a manager do when communicating with their teams is try to leverage video as much as possible. I think the communication's a lot better if you

hop on a video chat using any of the different video services, even FaceTime or Skype or things like that, because you get a lot more of the context in terms of how people are actually reacting to the things that you're saying, whether they're really understanding it, because so much context is lost through text and email communication.

Along with improving the type of communication you're using with your field team, it's also important that expectations don't fall through the cracks. Because the communication is more difficult, it's sometimes hard for reps to understand what their key priorities are.

So in addition to using a lot of video communication and things like that, the other thing that I recommend is having a list of priorities and goals for each of your reps in a document and actually refer back to that regularly, whether it's in your weekly or monthly one-on-ones with each rep.

What can field marketing reps do to keep their managers up-to-date on what's happening in the field?

It's important that reps are giving good information back to managers about their challenges, what they need help with, what's actually going on out in the field. Obviously one great way to do that is to use a mobile app so that all



Mike Volpe

Mike Volpe is an entrepreneurial /startup executive with expertise in marketing, business development, strategy and lead generation for cloud, SaaS and B2B software. He is currently the CMO at Cybereason and also serves as an angel investor and startup advisor. Previously, he joined HubSpot as the fifth employee and as CMO helped the company grow from about a dozen beta customers to over 15,000 customers, 1,000 employees, \$150m in revenue.



In addition to using a lot of video communication and things like that, the other thing that I recommend is having a list of priorities and goals for each of your reps in a document and actually refer back to that regularly, whether it's in your weekly or monthly one-on-ones with each rep.

the information about your visits and all the work you're doing in the field is going back to your manager and is going back to them in a way that's easy to understand and to process.

In addition to that, I think it's important that you not be afraid to talk to your manager. Maybe initiate video chats with your manager; text, email, other types of communication as well, and make sure you're giving your manager a good view of what's happening in the field. I'd say if you go more than a couple days without talking to your manager, it means you probably should be thinking about what you could've communicated about - something you've seen in the past couple of days or something you've done in the past couple of days.

You've got to remember that managers are trying to have a good idea about what's going on in the field, but it's hard for them because there's a lot of different reps they need to manage and they don't have an opportunity to get out in the field as often as the reps do. So the more information you can give back to them about what's actually going on, what's working well and not working well, is actually really valuable to them as somebody in the business.

What can managers do to help build a positive and productive culture in their remote teams?

The first thing is, I would try to find a way to get the reps together in one place to spend some time with each other. I think that that's important. Maybe it's on a quarterly basis, maybe it's on an annual basis, maybe it's after hitting certain sales goals or sales milestones - but I would figure out a way to actually add an in-person component to the team.

After having met in-person stuff, there's a few ways that you can take some of those relationships that have started to form and continue them on in a more virtual way.

I would encourage you to have friendly competitions that are not only just individual-based, but maybe team-based as well. I've seen a lot of success with sales teams maybe



pairing two reps up with a combined goal for each of those teams of two reps competing with each other. That way, it's not sort of everyone against all the other reps, but actually forming teams and changing those teams regularly -

giving different reps a chance to get to know one another.

What steps can reps take to improve their team culture?

I would encourage individual reps to build relationships with other people within your region or broader area within your company. And I would maybe set times, maybe it's every other week for thirty minutes, and do a call with one other person and get some tips from them. I think that I've always learned a lot in my career from my peers.

My recommendation would be to form some sort of peer group, maybe it's a couple people dialing into one conference call number or maybe it's one-to-one relationships where you just try to trade some tips and learn from each other. I think that can be a great way for a field team to get to know each other and sort of get better leverage of the knowledge that's out there with the field team.

How can teams use digital communication tools to help build culture?

In years past, it was hard to build a good culture among a field team because so much of our relationships are based on

in-person get-togethers. But now, so much of our relationship-building and communication shifted to digital forms, mostly on mobile devices now, that I think there's a lot of ways you can sort of build and stimulate a culture using that.

So I would encourage, as a manager, and I would, as a rep, take the initiative, to do a lot of informal communication - whether it's leaving comments and things like that on other people, or responding-all to emails about "Great job on that account!", or things like that.

I would encourage people to be human in their communication and not worry too much about being too corporate and instead take the informal communication that you're using in your natural life and bring that into the business world a little bit. I think that the same people that you're texting with on the weekend are likely to be the types of people that you're also working with, and so I wouldn't be afraid to sort of keep that informal level of communication, that frequent sort of small check-ins, and use that as part of the culture of your field team.



Course 9: Improving Your Work in the Field

Discover how to analyze and improve your performance in the field

Summary of Video Lecture

What's the best way for reps to improve their work in the field?

The first thing about setting some kind of a goal is that ultimately we set goals to change, and something may have happened. You're not making your quota, your dealer network is shrinking, your calls are going unanswered, you name it, there's a million reasons why.

Now you need to take that next step and say "Well aspirationally, what do I hope to get out of that change?". When you equate enough pain to make you change and you see a better aspiration, you know you see a better goal. But if you don't get those two right, you're going to be like a lot of those people who make a New Year's resolution ("Yeah, I'm going to try better" and then a week later they're having a bagel and a frappuccino and saying "to hell with the diet"). And I don't want that for you. So, when you make that association of "what am I going to get out of it?", and you see that well enough, then it changes. Your goal has to be clear.

Why do goals have to be specific?

An example I always heard when I was going through Zig Ziglar and Tom Hopkins and a lot of those guys in the '80s that is think of it as two ways: your buddy says "Let's go on a cruise" and you're like "Ok, great. Where are we going to go?" "Well, we're going to have fun and it'll be nice and it will be great. We'll be gone for two weeks, it's all-included." And you're like, "Maybe."

What if that same guy said, "We're going to fly from New York. We're going to land in Greece. We're going to spend



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a week on a private yacht searching the blue seas. We'll fish and eat what we catch. We also have a five-star chef who will be on board. And every night there's going to be drinks and dancing, and all kinds of other things. And then we're going to board the QE 2 and we're going to take that up to London and every stop along the way is going to be one of the great cities of Europe and then we'll be back in two weeks." I don't need to go into anymore details, but do you get the idea? That when the goal is broken down and you can see it, then you're more inclined to want to follow it. So that's my tips on setting goals.

How should reps balance their success with that of the team?

I always think you have to give back. I teach a lot about personality styles, and I don't spend a lot of time on it, but just to understand that there are different personalities across the board and along the way you've got to be able to give them some love or they're not going to help you as much. If you understand your personality type, then you understand how that plays into the people you have to talk to throughout the day.

What are the hard questions reps should ask themselves if they fall short of their goals?

The number one place I always start is "What could I have done better?" So, "What did I bring to the table that was wrong?" "What could I have said differently?"

And then also acknowledge that "Maybe I was here at the wrong time for them. Maybe they had too many people that were asking the same thing. Maybe they were having a bad day. Maybe they didn't prep the call well enough." And then I always go with, "What information do I wish I had now that I should have gotten before the call?"

How can reps get more information before store visits?

So one of the big things I like to do is check everybody out on LinkedIn and Facebook; that's pretty easy to do. You should at least have a basic understanding of how that works so that you can go through and understand what they've been up to. Maybe half of your clients aren't on it, but if they are on it you can get an awful lot of information about them pretty easily.

In the old days we'd say, "Just try to get in the door and look around and see if there's anything you have in common." And that still can work. But the days of you walking in as an outside field rep saying, "Hey, how's it going? Here's a dozen donuts. Can you give me a return authorization for this product?" Your business would be gone if that's all you're doing. At the end of the day, you've got to make some kind of a contact with these people. So the more information you have, the better.

Instead of asking how business is, you want to share positive stories. If they associate positive stories with you, you can change the dynamic and show them how to sell your product a little better, how to use it a little better.

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