

# The Field Ride-Along

## Making the Most of an Important Day



Presented by  
Elaine Buckley





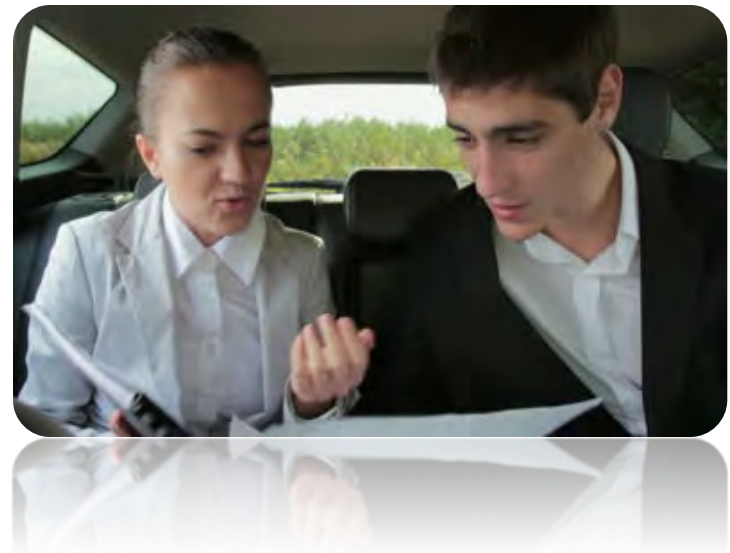
**Oh! Before we get started...**



**Take your Boss hat off.  
Put your Coach hat on!**

## What's a Field Ride-Along?

- ☐ A manager or coach observes a sales rep in action to get a better understanding of what is happening in the seller's territory.
- ☐ Managers use this time to reinforce best practices and discuss challenges.
- ☐ Opportunity for the leader to engage with seller in a dual selling effort.
- ☐ Typically half day to full day event. Always ride in the sales reps car.
- ☐ Field Rides should be a non-threatening experience. It's not a witch hunt.



# Components of the Field Ride

1. Benefits of the Field Ride-Along
2. Preparation
  - ✓ Setting up the day & scheduling appointments.
  - ✓ Overcoming the Anxiety of the Field Ride
  - ✓ Pre-Call discussion
3. What to do during the Sales Call
4. Post Call Debrief & Follow-up
5. Sellers: Be mindful when accompanied by a sales rep candidate.





**of the Field Ride-Along**



## The Seller

- Get a new perspective on your selling skills, time management & organization.
- Ability to learn some new sales skills & techniques.
- A fresh look at potential targets in your territory
- Opportunity to share concerns, wins and losses.
- Good time to build rapport

## The Coach

- Learn more about the rep's marketplace.
- Encourage a feeling of accountability for results.
- Help sales rep with difficult issues & accounts.
- Allows time to build rapport, motivate and pay recognition for a job well done.





## Prepare for the Field Day



**GET  
READY**





## The Seller

- ❖ Make at least 3 appointments with each of the following groups:
  - Current Satisfied Customers
  - Disgruntled Customers
  - Key Prospect Targets
- ❖ Bring along success stories or testimonials for these key business segments.
- ❖ Expect your coach to ask about your short & long term goals, so be prepared.

## The Coach

- ❖ Review your field day call expectations with seller in advance. Let him know you expect to see:
  - 3 Current Customers
  - 3 Disgruntled Customers
  - 3 Key Prospect Targets
- ❖ Set time aside in your schedule and leave an absent message on your voicemail to ensure you have an uninterrupted day in the field.
- ❖ Bring along the Seller's sales results for the last 60 days to review.



# Seller's Checklist



**...and last, please don't  
forget copies of your  
publication!**



# Overcoming the Anxiety of the Field Day



- ☐ Try to get a good nights sleep.
- ☐ Eat a light breakfast.
- ☐ Arrive early.
- ☐ Imagine or picture a successful day.
- ☐ Most important, be well planned.

**Planning builds confidence and  
confidence eliminates worry!**

# The Pre-Call Discussion

**The most important thing to discuss is how you two will communicate during sales calls.**

1. What's our plan for today?
2. How much time do we have between calls?
3. Tell me about the customers. History? Issues?
4. What role shall I play?
5. How should the coach/manager be introduced?  
Sales, Marketing, Customer Service?
6. How should we hand-off the conversation to each other?
7. Anything in particular that you'd like me to watch for during the sales calls?
8. How are you feeling about today? Any concerns?



The Leadership Institute

*Lighting the Way*



## What to do During the Sales Call







## The Seller

Remember what you learned in Sales Training:

- Prepare a good O.S.C.
- Ask a lot of Questions!
- Handle Objections quickly and to the point!
- Ask for the Order.
- Thank the customer for their time, sale or no sale.
- Leave him a reason to follow-up

## The Coach

- Listen, Listen, Listen to what seller did right and where improvement is needed.
- Resist temptations to interrupt or take over the sales call. Patience is a virtue.
- Speak highly of the Sales Rep to the customer & give praise.
- Thank prospects for their time whether they buy or not!



## Post Call Debrief

**It's time to give the sales rep feedback and recap the day. Keep it positive and motivational. Questions to ask yourself in preparation for the discussion are...**

- ☐ Did the Seller have good O.S.C. and build rapport with the prospect?
- ☐ Uncover the "needs" of the customer and then address them with F.A.B's ?
- ☐ Handle Objections or Avoid/Ignore them?
- ☐ Ask for the Order?
- ☐ Did the Seller leave with a reason to follow-up?
- ☐ Was the Seller prepared for the day?
- ☐ What did the seller learn today?




The Leadership Institute

*Lighting the Way*



# Field Ride Follow-up



Follow Up!

## Sellers

- ☐ Be sure to thank your Coach for the time together.
- ☐ Let your coach know how & when you plan to follow-up on the accounts you visited today.
- ☐ Let your teammates know how the day went. It will take the fear out of upcoming field days with the boss, especially if it was a positive experience.

## Coach

- ☐ Follow-up with an email to the seller. Let them know how you appreciated spending the day together in the field.
- ☐ Perhaps you should consider sending a “Thank You” note to those accounts you visited. Let them know you appreciate their time & feedback.

## Riding with a Prospective Sales Candidate



**Sellers: Please be mindful when accompanied by a sales rep candidate in the field.**

- This is an important task. Recruiting is expensive and important to the company. Showoff our professionalism.
- Spend a full day of prospecting & servicing accounts. It's vital that the candidate sees & understand the job at hand.
- Share the true picture, the good, bad and ugly, but try not to discourage the candidate.
- Observe the candidate and think "as a customer, would I like and respect this person? Did they ask good questions?"
- Give detailed feedback to the Hiring Manager.
- Please be well prepared for the day & check your supplies.



The Leadership Institute

*Lighting the Way*

**...AND THAT'S HOW YOU ROLL!**



**Have a Great Field Ride-Along !**