

A woman with short brown hair, wearing a black polo shirt with the 'EDERER'S' logo on the left chest, is smiling and handing a small, crumpled paper bag to a customer. The customer, seen from the back, has long dark hair. They are in a grocery store, with shelves of various products visible in the background. The lighting is warm and focused on the interaction.

Taking Your Sales Outside



NHPA

EDUCATE | ADVOCATE | ASSOCIATE



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Before We Begin...

KISS

Keep It Simple Superstars.
We don't have to make anything harder
than it needs to be.

Legal Pad Logic

I use this as a basis for most all of my
presentations.

Doing Something is WAY Better than Doing Nothing

Even the smallest steps can create a
measurable impact.



“ It’s supposed to be **hard**.
If it were **easy**, everyone would do it!”

Tom Hanks, A League of Their Own

What We'll Be Looking At...

- The Case for Outside Sales
- Five Questions to Ask Yourself
- Thinking Outside the Store
- Winning the Sale
- Beyond the Sales Team
- Setting up for Long-Term Success





The Case for Outside Sales...

The Case for Outside Sales...

- Setting up an outside sales program can open new streams of revenue.
- Many retailers are doing it (half heartedly) or have tried and failed.
- The success of outside sales efforts hinges on how willing you are to invest your time and resources into making it succeed.
- You can't just start the program and expect it to run on its own.
- It takes a team and commitment from the owners down.



Creating an “ecosystem”...

- Outside sales success is a multi-part process where you have to have your systems working together.
- All parts are symbiotic.
- You can start by just sending someone into the field to drum up business, but long-term success requires a symbiotic relationship between areas of your business.
 - Marketing and promotions
 - Lead generation
 - Prospect qualifying
 - Outside sales reps
 - Internal team



Creating an “ecosystem”...

- Done poorly, setting up an outside sales team can do more harm for the business than good.
 - Not the right person
 - Not being prepared to handle orders
 - Overpromising and under delivering
 - You are now magnifying your potential weak spots



Creating an “ecosystem”...

- The benefits of an effective outside sales effort, however, are tremendous...
- - You are taking control of your sales growth
 - Broadening your brand
 - Scouting for new business opportunities
 - Identifying potential growth for your physical business
- Most successful companies in this industry rely heavily on business from outside sales



A man with a beard and short dark hair, wearing a blue and white checkered button-down shirt, stands in a hardware store. He is holding a red-handled paint roller in his right hand and a screwdriver in his left. The background is filled with shelves of various hardware items like paint cans, rollers, and tools. The image has a dark overlay.

Five Questions to Ask Yourself...

Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...
 - **Why?**
 - **Who?**
 - **What?**
 - **Where?**
 - **How?**



Five Questions to Ask...

- It's important to ask these questions so you can build your plan.
- Another big question is, does it make financial sense?
 - What kind of sales do you have to generate to offset the cost of a sales rep and sales support team?
 - What is the ROI timeline?
 - Are you willing to commit to what it takes to make it successful?



Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...

Why?

What are your motivations for dedicating more resources to outside sales?

Gaining market share

A defensive move

Broadening customer base

Promote product lines or services

All of the above



Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...

Who?

- One of the most important factors is having the right people involved in the effort.
- Outside sales skills are unique so someone who excels with customers in store might not be the right person.
- It is a total team effort internally and externally.



Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...

Who?

- A good sales representative is:
 - Organized
 - Self motivated
 - Not deterred by rejection
 - High level of PK
 - Consultative
 - Likable



Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...

Who?

- With outside sales the client interaction is 1/3rd of the job.
- Prospecting, organizing leads, preparing proposals, etc. make up the other 2/3 of the job. So keep this in mind when looking for your reps.



Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...

What?

- It sounds like a simple question but it is important to provide clarity, also to evaluate what products/projects/target customers make the most sense for your business.
- You must answer this question to have a focused approach.



Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...

What?

- Are they selling everything you offer or a limited set of products or services?
- Sometimes starting with a more focused approach then scaling as you perfect the process is best.
- What are the parameters?
- What leeway do they have with setting pricing, delivery dates schedules, etc.?



Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...

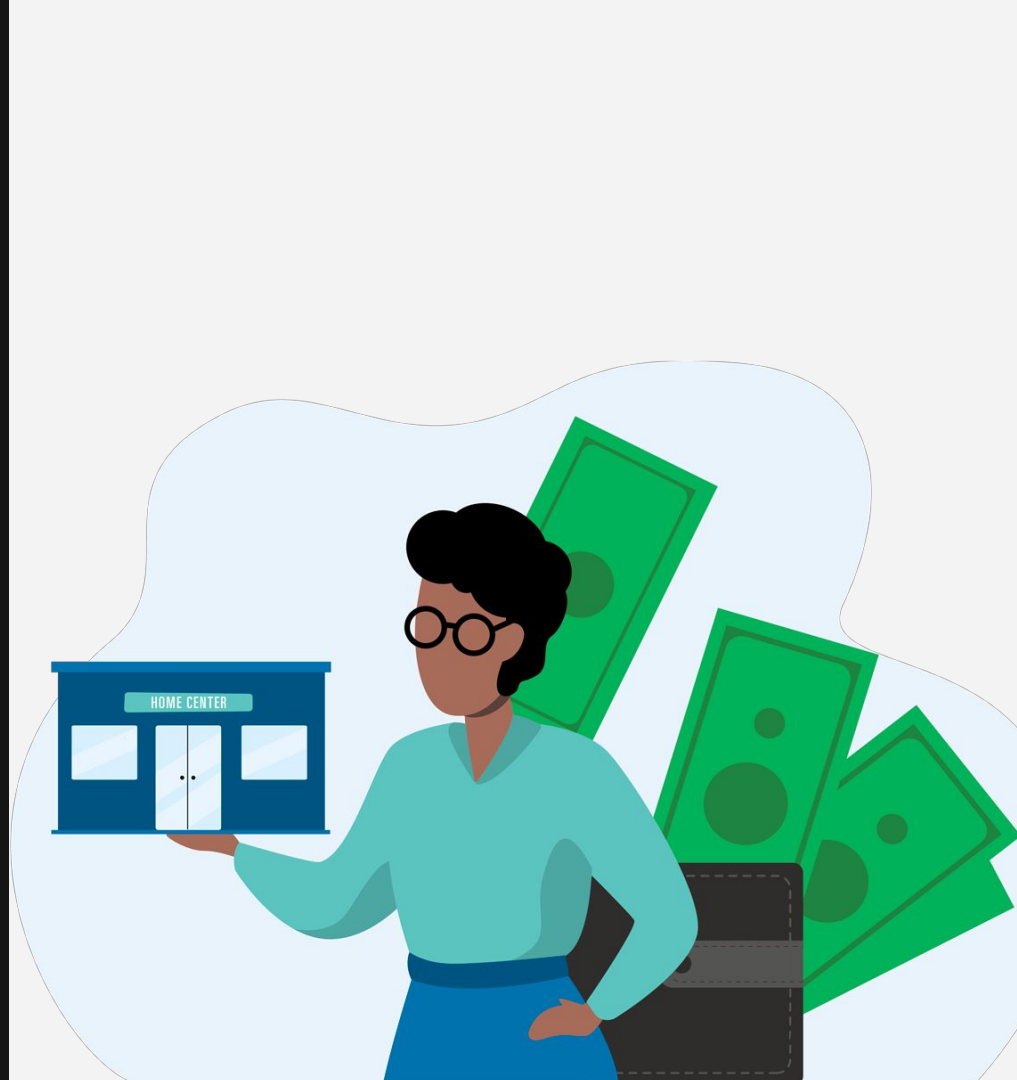
Where?

- It's a big market out there, how are you going to define the clients/area your sales team targets?
- Will it be by business type, by geography?
- Establishing the “where” also helps you when you start to build a “sales funnel”.



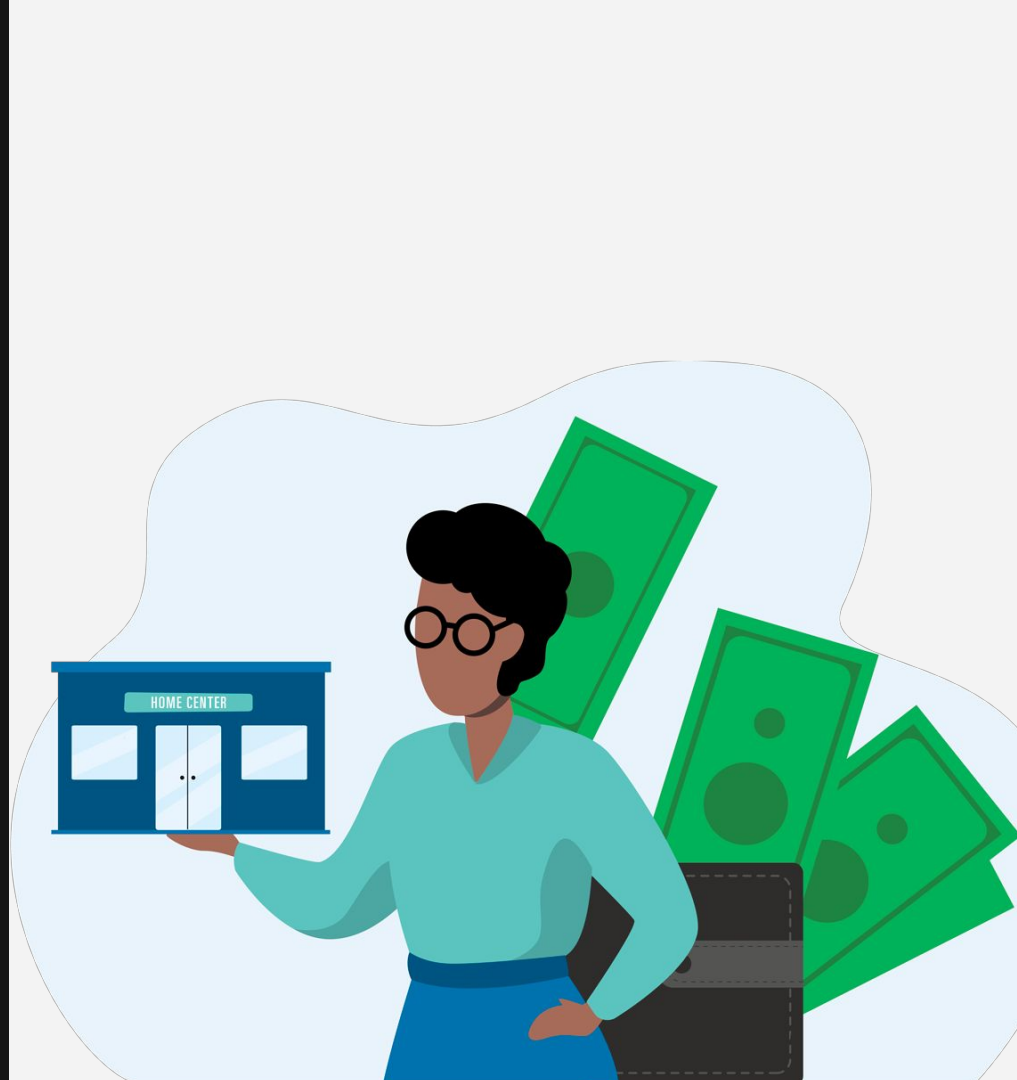
A quick word on the “sales funnel” ...

- You will likely turn over 20% of your accounts annually.
- You constantly have to put new leads in the top of the funnel to account for this turnover.
- The more qualified they become the further they move through the funnel.



A quick word on the “sales funnel” ...

- Understanding how this funnel works in your operation, allows you to mature your sales process.
- How many cold calls does it take to qualify a lead?
- How many leads does it take to get an appointment?
- How many appointments does it take to generate a sale?



Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...

How?

- One of the biggest mistakes you see as retailers start outside sales efforts is to fully address how they are going about the sales process.
- Just sending a rep into the field might be successful at first but frequently creates problems as you scale up.



Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...

How?

- How are leads handled?
- Where do they come from?
- How are they qualified?
- Who makes first contact?
- What is the sales process?
- Establishing a “client”
- Credit approvals
- Order fulfillment process including Q/C, invoicing



Five Questions to Ask...

- If you are looking to start or elevate your outside sales efforts, you need to start by asking some basic questions...

How?

- What is the cadence of calls/visits?
- Creating the milk route
- Maintaining relationships
- What happens after a sale is made?
- Follow up
- Quality control
- What happens once an order is complete?





Thinking Outside
the Store!

Thinking Outside the Store...

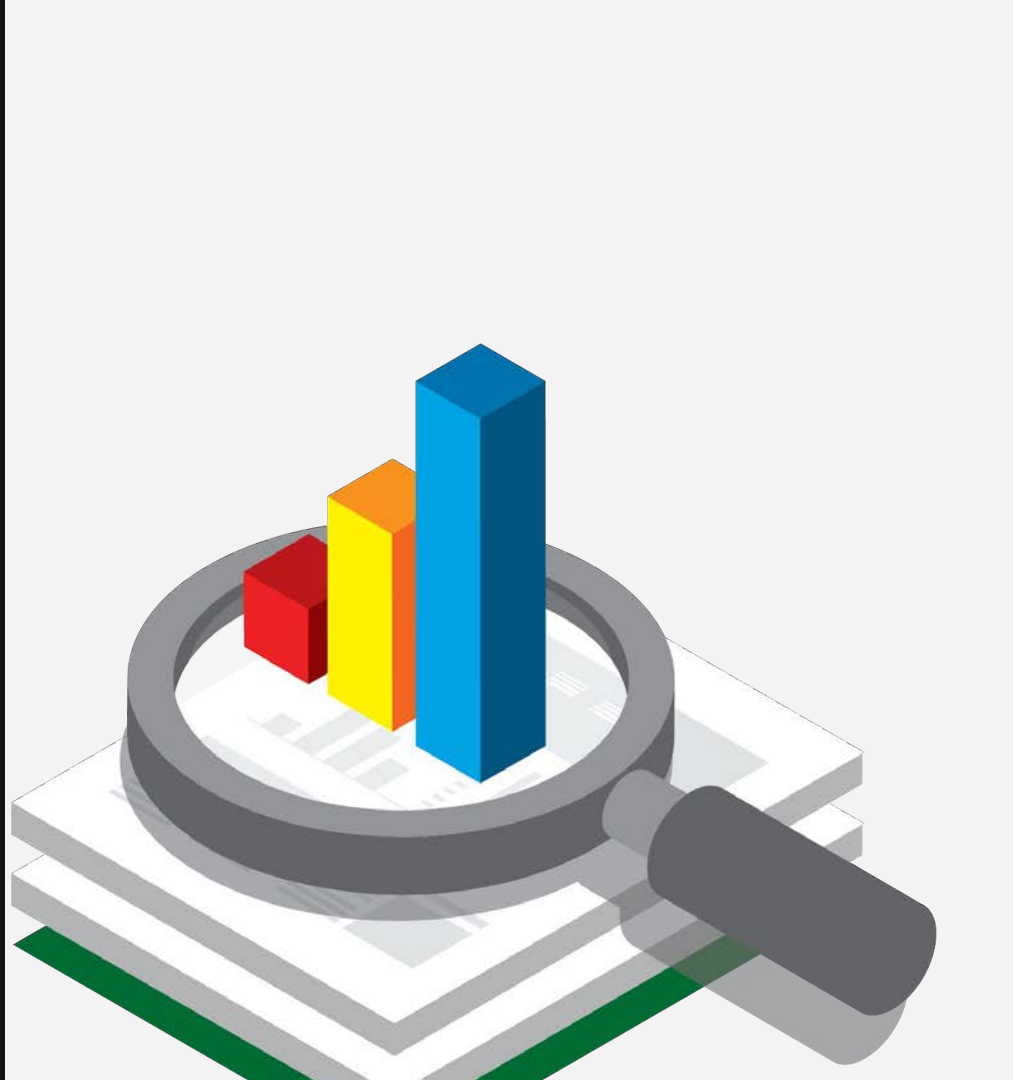
- Inbound vs. outbound
- Marketing and Promotions
- Prospecting
- Networking
- Your pitch



Thinking Outside the Store...

Inbound vs. outbound

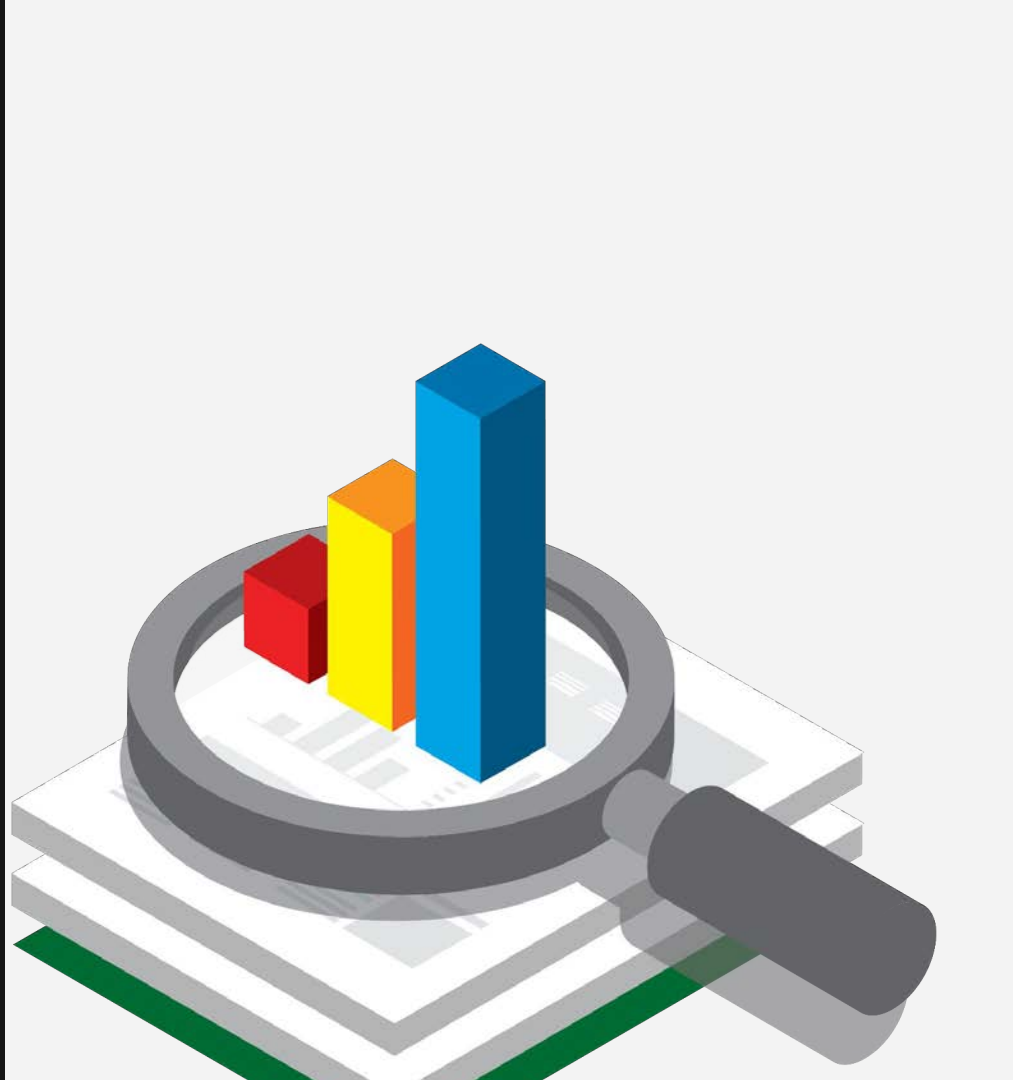
- Though similar there is a distinct difference between these two types of sales.
- Inbound, there is no “courtship” they have already chosen your business.
- A big part of outside sales is selling the company first.
- An individual who is good at one might not necessarily be good at the other.



Thinking Outside the Store...

Inbound vs. outbound

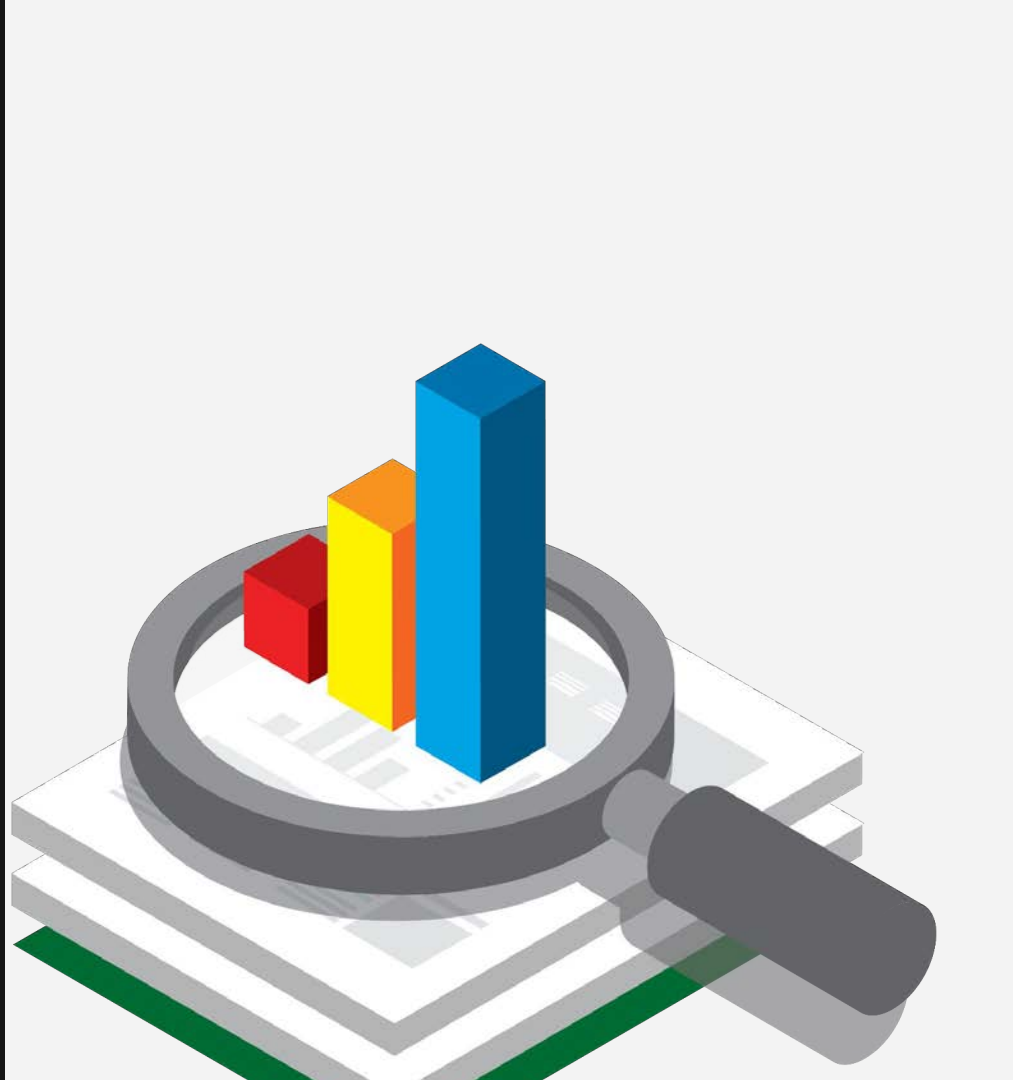
- The relationship is important but only part of the equation.
- You need a multi-faceted individual who also understands business cultivation.
- Gratification is not as immediate with outbound sales... success is about long-term cultivation of relationships.



Thinking Outside the Store...

Marketing and promotions

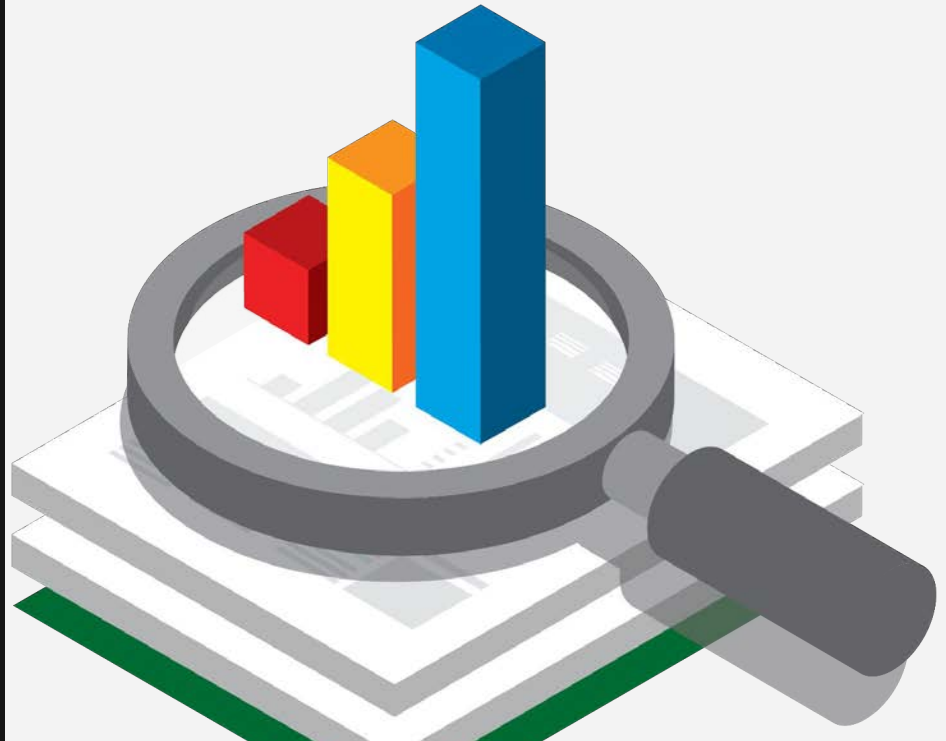
- Most retailers focus their marketing and promotions efforts on driving foot traffic into their stores.
- Marketing and promotions are equally important with outside sales but can have different goals...
 - Generate leads
 - Qualify potential customers
 - Promote products to existing customers
 - Secure a visit from your sales representative



Thinking Outside the Store...

Prospecting

- The process of identifying, vetting and further qualifying new customers.
 - Understanding the sales funnel
 - Pour as many potential customers as you can into the top of the funnel
 - These prospects “narrow” as you work them through the funnel
 - What you end up with are high-quality leads



Thinking Outside the Store...

Prospecting

- What resources are you going to use to prospect?
- Whose responsibility will it be?
- What is the cadence for making first contact and moving prospects through the sales funnel
 - Initial contact and query
 - Follow up call
 - In person call with presentation
 - Account creation (credit)
 - First orders
 - Order follow up
 - Ongoing contact



Thinking Outside the Store...

Networking

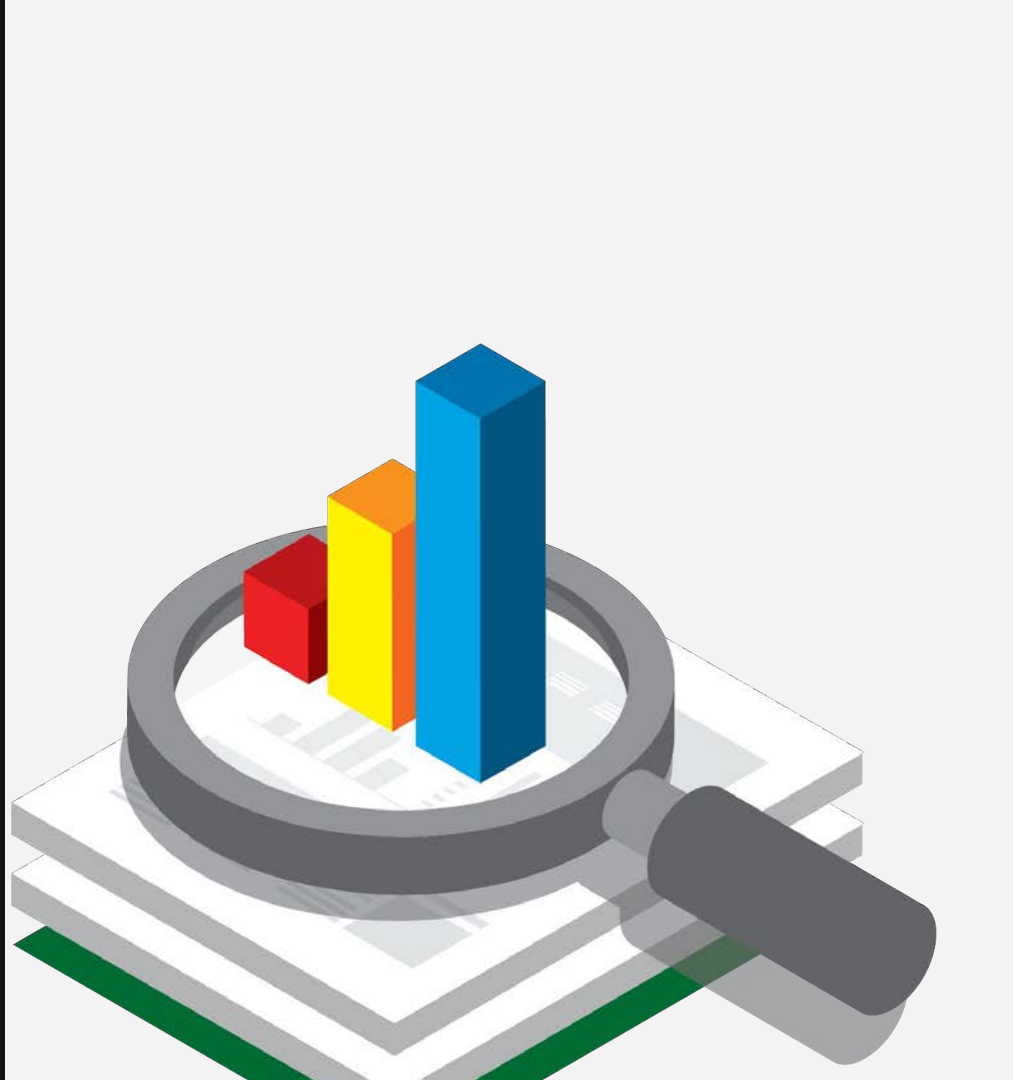
- A big part of outside sales success is networking.
- This is putting yourself in situations where you are building relationships
- Going in not knowing what the payoff might be for the investment
 - Chamber events
 - Lunches
 - Business/civic organizations
 - Social networking



Thinking Outside the Store...

Perfect pitch

- Remember, the first step in successful outside sales is selling the business.
- What is your elevator pitch?
- The hedgehog principle
- Staying true to your brand
- What is your culture?
- Your outside sales team should understand all of these elements before they hit the field or talk to customers.



A man with a beard and short brown hair, wearing a blue and white checkered button-down shirt, stands in a hardware store. He is holding a red-handled paint roller in his right hand and a green-handled screwdriver in his left hand. The background is filled with shelves of various hardware items, including paint cans, rollers, and tools. The text "Winning the Sale!" is overlaid on the right side of the image in a blue and white serif font.

**Winning the
Sale!**

Winning the sale...

Be a problem solver

- Anyone can sell product so focus on what you offer that other companies don't.
- Products can help differentiation but providing a solution for customers' problems builds long-term loyalty.
- Be prepared to explain how you will do that
- Have the internal systems in place to make sure that you fulfill these commitments.
- When mistakes happen have a plan on how you can fix them.
- Removing friction!



Winning the sale...

Shut up and listen

- Listening is the of the most overlooked quality for a successful outside sales rep.
- Ask probing questions...
 - What is the biggest challenge you face getting your jobs done?
 - What other suppliers have you used and why?
 - What could a supplier do to help any aspect of your business?
 - What would make your life easier?
 - What are your plans for growing your business?
- Delivering quality products at a competitive price, on time are just the entry stakes.



Winning the sale...

Add value

- Simple to say but difficult to do. How do you add value to your customers' business?
- Seek to understand their business
- Anticipate their needs
- Learn what is important to them (this is different for each customer)
- Surprise them with solutions
- Don't be shy about reminding them how you help...
- *"I was glad to hear that our ability to deliver your products directly to the jobsite before your crew arrived helped you get the team right to work. Please let me know if you need anything else from us as you finish up the project."*



Winning the sale...

The customer is always right?

- This used to be the basic retail mantra
- It's simply not the case
- Sales team must be prepared



A woman with short brown hair, wearing a black polo shirt with 'SERIES' on the sleeve, is smiling and interacting with another person whose back is to the camera. They are in a store with shelves of products in the background.

Beyond the
Sales Team...

Beyond the sales team...

Let's talk about the team...

- Marketing and lead generation
 - Customer service
 - Sales support
 - Quality control
 - Picking and delivery
 - Follow up
-
- We don't need to over complicate the process and there are multiple functions that don't necessarily have to be handled by multiple people.
 - But they need to be handled.



Beyond the sales team...

Let's talk about the team...

- Marketing and lead generation
 - This can be performed in tandem with the sales reps
 - Establish what companies you are going to call on
 - Develop lead-generation tools or efforts
 - Develop a schedule for promotions
 - Gives sales team a reason for multiple contacts



Beyond the sales team...

Let's talk about the team...

- Customer service
 - This is as critical as the sales rep
 - The CSR does follow up work
 - It's good to have a second source of contact
 - Projects a strong image, gives customers an outlet
 - Second set of eyes on issues



Beyond the sales team...

Let's talk about the team...

- Sales support
 - When an outside sales rep has questions or issues, who do they call that will be there
 - This person needs to be familiar with the process and products
 - Can look at internal questions and field answers



Beyond the sales team...

Let's talk about the team...

- Quality control
 - Sales rep files an order
 - Who checks to make sure order looks correct
 - Quantities look right
 - Pricing looks right
 - Order moves along in a timely manner



Beyond the sales team...

Let's talk about the team...

- Picking and delivery
 - Q/C works in tandem with the picking and deliver
 - Makes sure orders are picked correctly, quantity correct
 - Deliver goes out on time
 - Delivery driver is another representative for your business



Beyond the sales team...

Let's talk about the team...

- Follow up
 - This can be a CSR, Q/C person or sales rep
 - Makes sure all was right or fields any issues with the customer



A man with a beard and short brown hair, wearing a blue and white checkered button-down shirt, is standing in a hardware store. He is holding a red-handled paint roller in his right hand and a white paint can in his left hand. He is looking down at the paint can. The background is filled with shelves of various hardware items, including paint cans, rollers, and other tools. The image has a dark overlay.

**Setting Up for
Long-Term Success!**

Long-term Success...

It's all in the details...

- The customer value equation
- Compensation and motivation
- Checks and balances
- Avoiding Stockholm Syndrome
- Keeping Everyone Happy



Long-term Success...

The customer value equation...

- Remember that you will likely turn over 20% of your outside accounts any given year.
- Savvy operators weigh the value of each of their accounts and are constantly looking to “upgrade”
 - How much is someone ordering?
 - What kind of margin are you getting?
 - How much hands on work is required?
 - What are the “write offs”?
 - The intangible value of the customer?



Long-term Success...

Compensation and motivation...

- Designing a compensation plan for your sales team can be challenging.
- A balance of security and “motivational pay” is important.
- When starting up you might have to balance the plan toward security.
- A good sales rep will want a more commission weighted plan.
- How do you account for repeat business?
- How do you account for inflation?
- Don't be scared to pay your sales reps well.



Long-term Success...

Checks and balances...

- Who is reviewing contracts?
- Who is looking at agreements over the long term to determine value?
- What are the triggers for growth?
- Growth can be unsettling for a sales rep.



Long-term Success...

Checks and balances...

- Avoiding Stockholm Syndrome
- You want your sales reps to be advocates for your customers
- Their paychecks still come from you
- Sometimes necessary to remind them of “why we are doing this”



Long-term Success...

Keeping everyone happy...

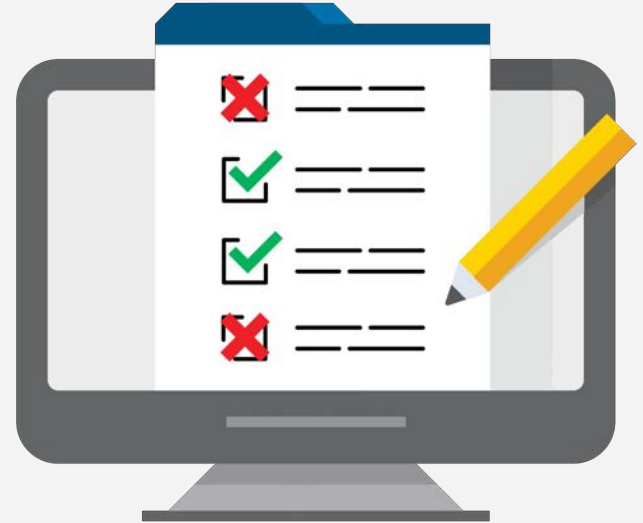
- This is EVERY member of the outside sales team we are talking about
- They need to enjoy successes together
- They need to truly understand they are all critical parts of the team
- Let them all know GOALS
- Let them ALL celebrate hitting those GOALS



Long-term Success...

A few final tips...

- Know your customers' businesses and anticipate their needs.
- Don't lead with price. Lead with value.
- Never disparage the competition.
- Know YOUR business, YOUR products.
- Share ideas.
- Perfect your pitch.
- Start small.
- START!



“ Everyone has a **plan...**
Until they get punched in the **mouth!**”

Mike Tyson, Famous Mouth Puncher



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Thank You!

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