



**2020 ADI Virtual Education Conference**

**Building Productive Sales Teams**

**Participant Workbook**

**Presenter:**

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## PROFILE: BOB BROWN

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**S**ales Systems Development, Inc. and its President, Bob Brown, have been serving clients for over 30 years. Bob is widely recognized as one of the leading beer, wine and spirits industry sales training and organization development consultants. As president of Sales Systems Development, Inc. and prior to that National Director of Sales Training and Recruiting for the E & J Gallo Winery, Bob has conducted over 500 seminars and his E-learning programs have involved over 10,000 supplier and distributor sales and management personnel in Asia, Canada, Central America, Europe, India and the United States.

Bob has served as selling, merchandising and sales management consultant for leading beverage and consumer product manufacturers, brokers and distributors. Among his clients are major U.S. beer, wine and spirits suppliers and wholesalers. Specific clients include Alaska Distributors; Anheuser-Busch; Bacardi U.S, Asia Pacific, India and Travel Retail; Boston Beer Co.; Breakthru Beverage; Brown-Forman Corporation; Columbia Distributing; Constellation Brands; Diageo; FIJI Water; Glazer's Beer & Beverage; Herradura Tequila, Mexico; Hood River Distilleries; Pepsi Cola USA; and Reyes Beverage Group. As a result, Bob is able to deliver insights on the sales processes and best practice training methods used by major consumer package goods, retail and foodservice organizations as well as the full range of beverage industry distributors & suppliers.

Bob has also been a featured speaker at ten annual Spirits Wholesalers Association and over 20+ National Beer Wholesalers Association as well as the 2019 American Craft Spirits Association, the 2014, 2015 Craft Beverage Expo's and three American Distillery Institute national conventions.

Bob has also served as an expert witness in a number of supplier–distributor litigations.

### Credentials

- Certified Management Consultant (C.M.C.) — the highest accreditation available in the consulting field.
- American Society of Training and Development — recipient of two national “Special Appreciation” awards.
- National Speakers Association — “Professional Speaker” designation.

### Experiences

- E & J Gallo Winery — National Director of Sales Training and Recruiting
- Kepner Tregoe, Inc. — Organization Development Consultant
- Kimberly-Clark Corporation — Consumer Product Sales and Sales Management
- Commissioned Officer — United States Army

### Education

- Post Graduate — Universities of Michigan and Alabama
- M.B.A. Brock School of Business— Samford University, Alabama
- B.S.B.A. — Kent State University

## BOB BROWN'S CLIENTS (PARTIAL LIST)

Agri-Mark Dairy Cooperative  
 Alaska Distributors Company  
 Alliance Beverage Distributing Co.  
 Allied Domecq Spirits and Wine  
 Anheuser-Busch InBev.  
 Atlas Distributing, Inc.  
 Bacardi-Martini USA, Asia Pacific and India  
 Bacardi Global Travel Retail  
 Beatrice, Inc.  
 Beverage Specialties, Ltd.  
 Blue Nectar Tequila  
 Borden, Inc.  
 Boston Beer Company  
 Brooklyn Brewery  
 Brown & Williamson Tobacco Corp.  
 Brown-Forman Corporation  
 Cabot Creamery  
 Caldbecks Wine & Spirits, Ltd.  
   ✓ Peoples Republic of China  
   ✓ Hong Kong  
   ✓ Taiwan  
 Casa Pedro Domecq, Mexico  
 Charles Fradin, Inc.  
 Charmer Industries, Inc.  
 Chateau Ste. Michelle  
 Churchill Distributors  
 Coastal Distributing Companies, Inc.  
 Columbia Distributing, WA & OR  
 Constellation Brands  
 Corby Distilleries Ltd., Canada  
 De Crescente Distributing Co.  
 Diageo Beer  
 Diageo Wine & Spirits  
 Dr. Pepper/Seven-Up, Inc.  
 Dun & Bradstreet Educational Services  
 Empire Distributors, Inc.  
 Evolution Craft Beer Company  
 Faust Distributing Company  
 FIJI Water  
 Frederick Wildman & Sons, Ltd.  
 Fremont Brewing Company  
 Fresh Samantha Juices  
 Glazer's Beer & Beverage  
 Grolsch Export B.V., The Netherlands  
 Henry A. Fox Sales Company  
 Herradura Tequila — Mexico  
 Heublein, Inc.  
 Hood River Distillers, Inc.  
 Houston Distributing Co, Inc.

Jardine Wine & Spirits, Inc.  
   ✓ Malaysia   ✓ Philippines  
 J.J. Taylor Companies, Inc.  
 Kitchens of Sara Lee  
 Major Brands, Inc.  
 Manhattan Beer Distributors  
 Marie Brizard Wine & Spirits  
 Merchant du Vin  
 Merrimack Valley Distributing Co., Inc.  
 Mesa Beverage Company, San Diego, Santa Rosa  
 Mission Beverage Company  
 National Wine & Spirits  
   ✓ Indiana   ✓ Michigan  
 New Belgium Brewing  
 Oak Beverages, Inc.  
 Odwalla Juices — Division of Coca Cola  
 Ole Smoky Distillery  
 Pacific Time Wine & Spirits, Inc., PRC  
   ✓ Beijing   ✓ Shanghai  
 Pepsi Cola USA  
 Philip Morris, USA  
 Premier Beverage Co.  
 Ralston Purina Company  
 Reyes Beverage Group  
   ✓ Chicago Beverage Systems, L.L.C.  
   ✓ Harbor Distributing, L.L.C.  
   ✓ Lee Distributors, L.L.C.  
   ✓ Mesa Distributing Company — San Diego  
   ✓ Premium Distributors of Virginia, L.L.C.  
   ✓ Premium Distributors, Washington, DC. L.L.C.  
 Rhode Island Distributing Company  
 Sanderson Farms, Inc.  
 SanPellegrino  
 Schreiber Foods, Inc.  
 Sheehan Family Companies  
 Sidney Frank Importing Company  
 Sleeman Breweries, Ltd, Canada  
 Snapple Beverage Corp.  
 Star Distributors, Inc.  
 The Stroh Brewery Company  
 Sunbelt Beverage, Inc.  
 Terrapin Beer Company  
 Union Beverage Company  
 United Liquors, Ltd.  
 United States Beverage, L.L.C.  
 Winebow — CA Distributor Operation  
 Young's Market Company OR, WA  
 Zonin USA

### Associations & Trade Organizations

American Craft Distillers Association  
 American Distilling Institute  
 Brewers Association of America  
 Craft Beverage Expo  
 National Beer Wholesalers Association  
 Missouri Beer Wholesalers Association  
 National Food Brokers Association  
 Ohio Beer & Wine Wholesalers Association  
 Washington/Oregon Beer & Wine Wholesalers Assn.  
 Wine & Spirits Wholesaler Association of America

## BUILDING PRODUCTIVE SALES TEAMS

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### Agenda — Three Focus areas...

#### 1. Building a Sales Team

- ➔ Common Mistakes
- ➔ Hiring Process
- ➔ Job Description

#### 2. Structuring the Sales Function

##### Considerations...

- ➔ Geography
- ➔ Distributor & Accounts
- ➔ Support

#### 3. Managing a Sales Team

- ➔ Distributor Management Processes
- ➔ Account Management Guidelines
- ➔ People Management Processes

### Question & Answer Forum at Conclusion



**AMERICAN DISTILLING INSTITUTE**  
THE VOICE OF CRAFT DISTILLING

## COMMON MISTAKES BUILDING A SALES TEAM

### Common Mistakes Building Productive Sales Team?

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### #1 Build People into the Business Plan

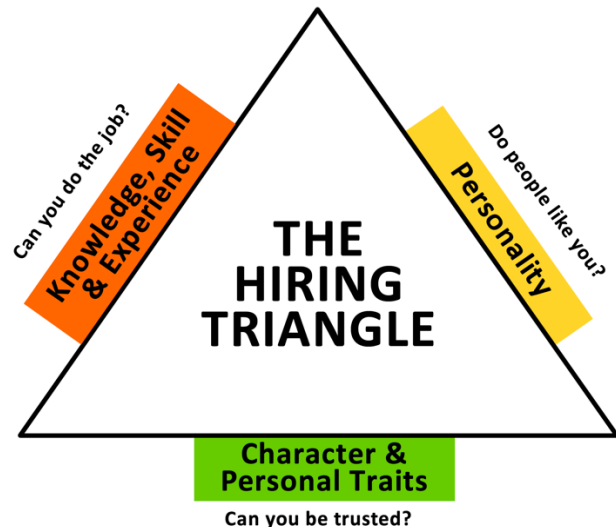
Consider when you transition from:

- ➔ On-site Distillery to On and Off-premise self-distribution
- ➔ Self-distribution to Wholesaler Network
- ➔ Expansion to New Markets, States



### Keys to Good Hires

1. Job Description
2. Job Specifications
  - ➔ Knowledge & Skills
  - ➔ Personal Traits
  - ➔ Experience
3. Interview Process
4. Background checks



# SALES REPRESENTATIVE JOB DESCRIPTION

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## 1. Planning

Plan all time and activities to achieve sales goals within assigned territory.

### Specific responsibilities

- ⇒ Analysis of sales trends and opportunities for the territory and each account
- ⇒ Planning sales objectives for the territory, each account and call
- ⇒ Planning sales presentations to achieve sales goals

## 2. Selling

Deliver sales presentations to accomplish the assigned sales goals.

### Specific responsibilities

- ⇒ Gain distribution on and off-premise
- ⇒ Obtain promotions and displays
- ⇒ Sell shelf changes and resets
- ⇒ Achieve sales volume goals

## 3. Merchandising

Maximize sales through the effective presentation of company brands at the point of purchase.

### Specific responsibilities

- ⇒ Achieve competitive shelf space, position and arrangement
- ⇒ Establish and maintain competitive pricing
- ⇒ Meet display standards — price cards, P.O.S., buying message and prime location
- ⇒ Place point of sale in high impact on and off-premise locations

## 4. Customer service

Develop professional customer relationships.

### Specific responsibilities

- ⇒ Regular coverage & frequency
- ⇒ Make complete sales calls
- ⇒ Provide staff education
- ⇒ Effective housekeeping and rotation
- ⇒ Perform accurate inventory checks and place correct orders
- ⇒ Help customers “Buy Right”

## 5. Communication

Maintain reliable records of the conditions within accounts and territory. Provide requested reports and information accurately and on time.

### Specific responsibilities

- ⇒ Follow standard policies, procedures and schedules
- ⇒ Prompt reporting and record keeping
- ⇒ Provide information on competitive conditions
- ⇒ Adhere to company policies and procedures

# FOLLOW A SELECTION PROCESS

## 1. Sales Representative Selection Criteria

## 2. Interview Evaluation form

Applicant: \_\_\_\_\_ Address: \_\_\_\_\_

Considered for: \_\_\_\_\_ Referred by: \_\_\_\_\_

Interviewed by: \_\_\_\_\_ Date: \_\_\_\_\_

	High	Average	Low	
	10	5	1	Comments
<b>KNOWLEDGE AND SKILLS</b>				
Planning	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Organization	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Communication	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Analytical	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Selling	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Objection-Handling	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Merchandising	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Administrative	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Interpersonal	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
<b>TRAITS</b>				
Competitive	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Ambitious	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Empathy	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
High Energy Level	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Creativity	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Maturity	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Enthusiasm	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Stability	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Competence-Oriented	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Achievement-Oriented	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Ego Strength	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
<b>EXPERIENCE</b>				
Beverage Selling	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Consumer Products Selling	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Related Customer Sales	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
Experience	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_ _ _ _ _ _ _ _ _ _ _	_____
COMMENTS _____				
RECOMMENDATION:                      HIRE _____                      HOLD _____                      REJECT _____				
ACTION TAKEN: _____				

## 3. Multiple Interview Process

## 4. Background Checks and Testing

## FOCUS AREA #2 STRUCTURING THE SALES FUNCTION

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### 1. Geography

- ➔ Take Full Advantage of **“LOCAL”**
- ➔ Flow Outward from Strength
- ➔ **“Brands Are Built On-premise”**
- ➔ Target Events for Visibility



### 2. Distributors and Accounts

- ➔ Distributors
  - ✓ Target Logical Channels
  - ✓ Identify **“Value Added”** Distributor Salespeople
- ➔ Classify Accounts
  - ✓ Off-Premise — **“A, B, C”** or High Traffic, (HT), Medium Traffic (MT), Low Traffic (LT), Low Traffic Merchandisable (LTM)
  - ✓ On-Premise — Image and Volume
- ➔ Establish Coverage & Frequency Guidelines



## FOCUS AREA #2 STRUCTURING THE SALES FUNCTION

### 3. Support — 4 Key Areas

1. Information
2. Pricing
3. Sales Tools
4. Production, Shipping & Customer Service



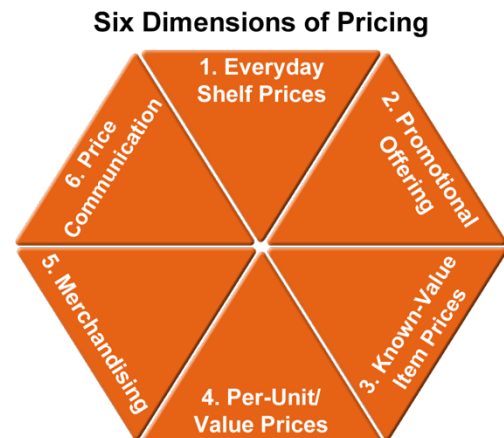
#### 1. Information

- ✓ Salesperson performance
- ✓ Team performance
- ✓ Account performance

**Sales vs. \_\_\_\_\_ & \_\_\_\_\_ by Brand & SKU**

#### 2. Pricing — consider...

- ✓ Know “competitive set”
- ✓ Quantity Discount (QD) levels
- ✓ Margin requirements
  - Wholesale
  - Retail
  - Everyday
  - Feature
  - Back out from target retail



## FOCUS AREA #2 STRUCTURING THE SALES FUNCTION

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### 3. Support (continued)

#### 3. Sales Tools

- Incentives
- Sell sheets
- P.O.S.

#### Incentives — Consider the “Mix”

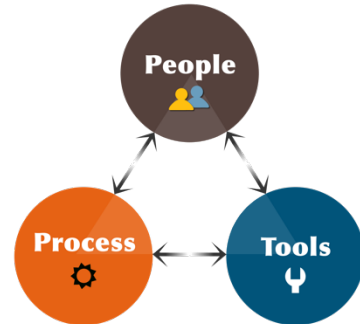
Distributor	Trade	Consumer
<ul style="list-style-type: none"> <li>➤ Which level of sales organization drives sales in the market?</li> <li>➤ Based on Type Goal:               <ul style="list-style-type: none"> <li>✓ Distribution</li> <li>✓ Display</li> <li>✓ Feature</li> </ul> </li> <li>➤ Timing</li> </ul>	<ul style="list-style-type: none"> <li>➤ Deals &amp; Margins required:               <ul style="list-style-type: none"> <li>✓ Every Day</li> <li>✓ Feature Prices</li> <li>✓ On-Premise Special Drinks</li> </ul> </li> <li>➤ P.O.S.</li> <li>➤ Training</li> <li>➤ Trade Shows &amp; Events</li> <li>➤ Store Demo’s &amp; Sampling</li> </ul>	<ul style="list-style-type: none"> <li>➤ Target Price Points</li> <li>➤ Coupons &amp; Rebates</li> <li>➤ Premiums</li> <li>➤ Contests/ Sweepstakes</li> </ul>

### 4. Production, Shipping and Customer Service

## FOCUS AREA #3 MANAGING THE SALESPERSON OR TEAM

### Managing the Salesperson or Team

1. Distributor Management Processes
2. Account Management Guidelines
3. People Management Processes



### #1 Distributor Management Processes

#### ⇒ *Collaborative* Annual Business Plans

- ✓ It's a “Sales/Market” plan, not a “\_\_\_\_\_” plan.
- ✓ Be prepared, relevant, realistic.

### Annual Plans — the Process

4. Opportunities

3. Investment/Changes

2. Trends

1. Base Volume by Brand

Know Where the Business is \_\_\_\_\_ !!



## 3. PEOPLE MANAGEMENT PRACTICES

### #2 Account Management Processes (cont.)

- ➔ **Weekly Phone Call, or Meeting, with Set Agenda**
  - ✓ Sales Results for Week — # calls, volume, distribution, displays, etc.
  - ✓ Key Successes
  - ✓ Distributor or Account Issues
  - ✓ Goals for Upcoming Week
  - ✓ “Housekeeping” — pricing, shipping, P.O.S., etc.
  
- ➔ **Monthly Meeting — team & one-on-one**
  
- ➔ **New Hire “On-Boarding”**
  
- ➔ **Working with Each Salesperson**
  
- ➔ **Providing Coaching and Performance Feedback**
  
- ➔ **On-Going Training and Development**
  
- ➔ **Performance Evaluation**



## SUMMARY

### BUILDING A PRODUCTIVE SALES TEAM

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#### 1. Getting Started Building a Sales Team

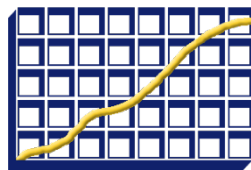
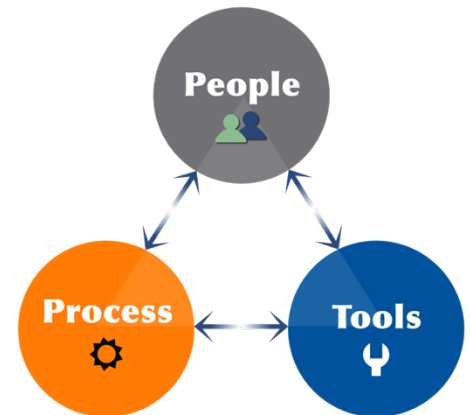
- ⇒ Common Mistakes
- ⇒ Job Description
- ⇒ Hiring the Right People

#### 2. Structuring the Sales Function

- ⇒ Geography
- ⇒ Distributor & Accounts
- ⇒ Support

#### 3. Managing a Sales Team

- ⇒ Distributor Management Processes
- ⇒ Account Management Guidelines
- ⇒ People Management Processes



Sales Systems  
Development, Inc.



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DISTILLING  
INSTITUTE™

THE VOICE OF CRAFT DISTILLING

## **Bob Brown's Instructor-led Training Programs & Sales Meeting Presentation Topics**

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### ***“Building Brands Through Distributors™”***

Training designed to provide brewery, winery & distillery sales personnel the sales management processes & skills needed to effectively gain the support from distributors as well as understand how distributors are organized, operate and want to work with supplier sales personnel.

### ***“Professional Selling and Merchandising Skills”***

An eight-module training program on how to plan and make a sales call, deliver effective sales presentations, handle objections, sell displays & new on & off-premise distribution as well as effectively manage shelf space. The eight modules are available as a complete training program or as separate topic modules. Each module includes a Trainer's Guide, PowerPoint™ slides and participant workbooks.

### ***“Managing & Developing People”***

Leading edge training for sales managers on how to effectively plan, organize, direct and control sales personnel. Techniques and processes are provided on how to recruit & select, train, coach and deliver the motivation and leadership that produces high performance sales teams.

### ***“Group Training & Communications Skills™”***

#### ***HOW TO CONDUCT EFFECTIVE DISTRIBUTOR SALES MEETINGS AND TRAINING WORKSHOPS***

The ability of a distiller to effectively present their portfolio, educate & motivate distributor sales organizations has a significant impact on sales results & the credibility, reputation and image of their people. Learn platform speaking skills, how to motivate, organize information, use visual aids, such as PowerPoint™ & generate participation.

### ***Key Account Selling & Category Management***

Understand how major chain accounts are organized and operate — primary retail sales and marketing goals. Learn the information key accounts want from salespeople and practical ideas on how to present to buyers. Obtain format to use on selling new distribution, displays and feature ads. Gain an understanding of concepts and application of category management.

***The training & development programs described can be conducted by Sales Systems Development or provided to an in-house client trainer.***

## Low Cost, High Impact E-learning Training Programs

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### Multi-Media Online E-Learning Training Series

- Flexible, convenient — people learn at the time & place of their choosing
- Low cost — only \$290 per module, plus no trainer fees or T&E expenses
- Participant workbooks are available & tests are built-in to validate learning
- Certificate upon completion & results are communicated to you
- Tailored to selling beverage brands to on and off-premise customers

#### *“Professional Selling Skills” — your people will learn how to...*

- Sell **new distribution** and displays.
- Prepare & **deliver more effective presentations** that SELL more spirits.
- Successfully **handle objections**.

#### *“Building Brands Through Distributors™” — your people will learn...*

- The factors that determine **distributor “share of mind” for a supplier**.
- **Common mistakes** distillery representatives make working with wholesalers.
- How to plan & manage **program distributor sales execution**.

#### *“Group Training & Communication Skills™” — how to conduct effective sales meetings and training workshops...*

- Prepare **better sales meetings in less time**.
- **Overcome nervousness** & effectively speak to groups — platform speaking skills
- Effectively use **PowerPoint™ and visual aids** — no more “death by PowerPoint™.”

#### *“Professional Negotiation Skills” — your people will learn...*

- **Seven negotiation tactics** that will impact results.
- Techniques for **obtaining & offering concessions**.
- How to use **power & leverage** when negotiating.

#### *How to View a Demo or Register to Participate in any of the Programs:*

To **view a brief demo** to learn the goals, key content and structure of any of the four e-learning training programs go to <http://www.salessystems.net>.

To **participate in any of the e-learning programs**, click the [Create New Account](#) link to log into E-Learning site (<https://salessystems.digitalchalk.com>) & create an account, click the Catalog tab to register for one of the programs. The cost is \$290. Pay on-line with credit card using the site shopping cart. To ask questions or for clarification, please e-mail [bob@salessystems.net](mailto:bob@salessystems.net) or call (650) 691-9622.