



ELECTRO  
FEDERATION  
CANADA



# Joint Calls Between Agency Reps and Distributors

Best Practice document developed by EFC's CMG Committee

# Opportunity Assessment:

- Make sure your target list aligns with the overall goals and objectives of your mutual business plan.
- Prioritize target list by sales potential.
- Agree on customers/products that do not result in channel conflict. Feel free to discuss multiple products that are in rep's portfolio to maximize efficiency.
- Be sensitive to the manufacturer and distributor's alliances and grow market share for both parties.

## Customer Profile

### 1. Company Name:

- Where did lead come from?
- New or legacy account?

### 2. Contact Name/Role:

- Relevant background on contact: New/established in role? Previous workplaces/roles? Shared connections? Interests? Personality Style?
- Contact's role and authority in decision making process: decision maker/influencer

### 3. Types of projects/markets customer is in?

### 4. Sales data for customer? Total Sales/Product Mix

### 5. Brands/Distributors/Solutions currently used by customer (competition)?

- Pain points for customer? Quality/Delivery/Application issues/Technical support/Price/Installation issues/New regulations?

### 6. Current opportunities customer is working on?

### 7. Potential Revenue: Next 12 months? Next 3 years?

## Objective of Call/Pre-agreed Outcomes *(select all that apply)*

- Exploratory/discovery meeting: understanding what is important to the customer and how your solutions may bring them value
  - Current Customer and expanding the product mix the customer is currently buying
  - Secure an invitation to quote on an opportunity
  - Solution presentation for opportunity
  - Strategic positioning of product/distributor offering
  - Service call due to a service/quality breakdown.
  - Relationship repair
  - Training
  - Other?
- 

## What is our Value Proposition?

Customer will want to know “What’s in it for me?” for objectives outside of discovery

### **Introduction**

### **Problem addressed**

### **Customer’s desired outcome**

### **Core Capability of (Dist/Mfg) team**

### **Competitive Differentiator**

- What are our (distributor and manufacturer) relative strengths?
  - Location/Relationships/Price/Quality/Service/breadth of solutions/tech support
-

## Call Plan

- Length and location of appointment
- Advance preparation required (presentations/samples/technology check etc)
- Discussion on pricing communications/approach

### Roles by objective:

Who is going to take the **lead**?: Introductions/establish context/confirm agenda and timing?

**This should be based on who the lead came from.**

Who will be asking the **questions**/making **presentations**/reviewing reports?

**This will be based on the specific objective and relative expertise. Roles can be shared.**

What topics should be **'off the table'**/not discussed?

**ie. Competing product lines, areas of concern, certain pricing conversations**

Who will be **summarizing and identifying next steps**?

**This should be agreed based on the objective and agreed to before the meeting..**

---

## Call Follow-up

- Agree on actions/accountability/time line
- Agree on communication follow-up with customer
- Document actions
- Agree on review date of actions
- Document whether objective was reached

---

## Joint Call Reporting

Develop a report to track the following

# of joint calls

Status on objectives reached

Sales outcomes

Suggested improvements