

# How to Motivate Your Sales Reps to Collect CI When They Are Visiting Customers

by David Lithwick & Marta Cocev

## Introduction

One of the most challenging tasks in formalizing a CI program is motivating sales reps to collect and report CI. It is one thing to ask your sales reps to collect CI, it is another thing for them to do it on a consistent, meaningful and accurate basis. As many reps are on commission, gathering and reporting CI is often viewed as a nuisance. Do not be surprised if a rep asks you, "do you want me to sell or to gather CI? Which is it?"

Without field intelligence from sales reps, your CI reports, at best, are an exercise in theory and conjecture. Consequently, the objective of this article is to provide you with some tips to help motivate your reps to collect CI and report back their findings.

## Tip #1 - Have A Clear Understanding of the Role That CI Plays

The definition we work with is:

*The role of CI is to help level your playing field by quickly and accurately pinpointing competitor threats, expanding your prospect list, learning from competitor mistakes, incorporating competitor best practices, surfacing market trends and uncovering hidden business opportunities.*

## Tip #2 - Find Out Why Your Reps, While On Sales Call, Will Hesitate To Collect CI. Are They, For Example:

- ✘ Afraid that asking for information will detract from their sales call.
- ✘ Not sure of the accuracy of the information.
- ✘ Do not know who, within the company, needs the information or in what format they need it in.
- ✘ Unaware of a central depository (or co-ordinator) to email findings to.

- ✘ Not getting feedback from their supervisor on the value of the CI they uncover.

## Tip #3 - Identify Steps To Help Your Reps Overcome Their Hesitation. These Would Include:

- Simplifying the process by setting up templates for reps to follow.
- Setting up an internal hotline.
- Setting up a CI intranet.
- Scheduling CI in other regularly held meetings.
- Ensuring that reviews of the CI provided by the reps are carried out.

## Tip #4 - What Replies Can You Give Your Reps When They Question The Need To Collect CI?

Excuse	Your Reply
It's not my job.	<i>Yes it is. CI is now incorporated into many job descriptions including yours and mine.</i>
I do not have time.	<i>Yes you will. We've put systems in place to help you source, receive and benefit from CI quickly.</i>
I know what needs to be known about competitors.	<i>Everyday things change in business. This includes new initiatives by our competitors.</i>
Why bother, it's not to tell us anything.	<i>Every piece of information counts, even if it is duplicated. Duplication serves to verify findings.</i>

## Tip #5 - What Are Some Techniques Your Reps Can Use To Get A Buyer to Speak?

- Bring something to the party (e.g. suggestion on how to increase sales).
- Begin with low-intrusive topics (e.g. changes in the industry).
- Weave in questions directly related to their information needs.
- For reluctant respondents, figure out the reason for hesitation and come up with a strategy to maximize co-operation (e.g. emphasize that no sensitive areas will be discussed, that you will call back at a less busy time, etc.).
- Be prepared to canvas a number of people until a credible source is found.
- Never give up. If rep can't get the information, then find a friend who can get around barriers.

## Tip #6 - What Guidelines Can Your Reps Follow To Ensure Their CI Reports Are Impactful?

- Keep the report to 1 page. Attachments can be included as a separate document.
- Frame your report around these headings: Goal of Sales Call/ Key Findings / Implications / Recommendations /Next Steps
  1. Spell out assumptions.
  2. Assign a threat level (e.g. none, low, medium, high, urgent) to the competitor activity reported on.
  3. For future reference, make a note of the rep's sources according to their co-operation and quality of information.

## Mini Case

Assume you have been hired to manage the CI department of a pharmaceutical corporation. For the past year your company has been working on **Oxylung**, a respiratory drug to penetrate this market sector. Your competitor's patent on a respiratory drug is terminating in a few months and last week, Oxylung received government approval. What a golden opportunity for your reps to gather CI while they are on their sales calls! Being proactive is an absolute necessity for you to succeed. Instead of waiting to see what your reps email back, you develop the following 2 templates for them to follow:

### Template 1

Rep's Name: Fred Eφος

Date of Meeting: 08/05/2000

Product: Oxylung

Contact	Market Position	Current Supplier	Level of Satisfaction	How to Win the Business	Key Concerns	Next Steps
<b>Company : IDA</b>  <b>Buyer:</b> <i>Andrew Raymond</i>  <b>Department:</b> <i>Respiratory</i>  <b>Budget:</b> <i>\$3.75 mln.</i>	<i>\$35 million retail sales/year</i>  <i>26% market share</i>  <i>20% growth versus 1999</i>	<i>Eon Med.</i>  <i>8 sales reps</i>  <i>3 offices: Mtl, TTO, Vcr</i>	<i>Low</i>  <i>Frequent shipping errors</i>  <i>Do not have a category management program in place</i>	<i>Superior shipping efforts (ie: faster delivery, less out of stocks)</i>  <i>Agree to use IDA's logistics company to ship goods</i>	<i>Up to 120 days to receive payment</i>  <i>Will need to give our distributors ¼ % rebate to offset the carrying costs</i>	<b>1. Determine whether any conflict of interest will arise, as we also sell to IDA</b>  <b>2. Finalize prices</b>  <b>3. Make presentation</b>

### Template 2

**Rep's Name: Dan Lieberman**  
**Customer: IDA Pharmacies**

**Date of Sales Call: August 21, 2000**  
**Buyer: Gary Grover**

- Niche or commodity market? *Niche*
- Sector? *Respiratory*
- Specific company (ies)? *IDA Pharmacies*
- What would you estimate the size of this to be? *\$35,000,0000 annual volume.*
- What do you estimate the annual growth to be? *6% to 8%*
  
- What factors are specifically driving the market? *Patent ended 6 months ago. 3 companies now selling generic products.*
- What Is Your Closing Strategy? *Show buyers product endorsements from 2 leading respirologists*
- Why Is It Successful? *The letters highlight our unique advantages (e.g. no side effects, safe for children)*
  
- Based On Your Visit, What Feedback Can You Provide About:
  1. Our competitors that we can take advantage of?  
*Buyer complained about the frequent shipping and invoice errors. Apparently, competitors do not use software that checks against delays and errors. Buyer is frustrated because the account rep does not check the invoices, before they go out.*
  2. Our own strengths that we can further capitalize on?  
*We have account reps who are dedicated solely to servicing one account. Therefore, the chances for errors in shipping, invoicing, etc. are minimized. Our reps are also required to take courses in inventory management.*
  3. A key weakness that we need to address to win more business?  
*Buyer concerned that our product formulation is not as good as their current supplier's.*

#### Authorization

I authorize that this fill in is as complete and as accurate as possible: *Tony Champion, Rep*  
Checked by: *Ernest Duquette, Sales Supervisor*

## Conclusion

Sales reps can be fearless in asking for information, after all these are the same people who will call in cold into a company and ask for business. Once you are able to get your reps to buy into the process and make them aware of how your company has benefited from their input, you are on your way. 🎯