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edited by Albert Newgarden

THE FIELD SALES MANAGER

A MANUAL OF PRACTICE



D. B. TARAPOREVALA SONS & CO. PRIVATE LTD.

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Foreword

THE FIELD SALES MANAGER for and about whom this book has been written is a line official who manages the activities of one or more outside salesmen in a field territory. Depending upon the nature of his company's sales organization and his position in it, he may be called a sales supervisor, a branch sales manager, a district sales manager, a regional sales manager, or a divisional sales manager. As more than one contributor to this volume has observed, the titles used to designate the various levels of field sales management in any given organization can be extremely misleading: A sales supervisor in one company may have considerably more responsibility and authority than a branch or district manager in another; and there are some companies that use the title "regional sales manager" to describe what in other companies would be considered a branch or district sales manager's position. It is partly, then, to avoid the confusion that would inevitably result from the use of specific job titles that the generic term "field sales manager" has been used, whenever possible, throughout this volume. A more important consideration, however, has been the editor's wish to emphasize those elements of management practice that are common to all or most levels of field sales management.

There are, of course, some very real differences between the management job of the regional sales manager responsible for ten district managers and a hundred salesmen and the management job of the sales supervisor responsible for half a dozen salesmen; and certainly it is not the intention of either the editor or any contributor to this volume to suggest that these differences are not important. To make this book useful to the greatest possible number, however, it has been necessary to minimize, and in some cases to ignore entirely, the differences in managerial responsibility and authority that exist between the various levels of field sales management and to emphasize the similarities that prevail. To the extent that the sales supervisor, the branch manager, and the regional manager are all managers of men, there are certain things that all of them must do, and it is with these things that the authors of this volume are concerned.

The job of a manager, it has been said, is "to get things done through the efforts of other people," and this definition has helped to shape the contents of this volume. There are, after all, many things that a field sales manager is called upon to do which do not directly involve the management of people. Some field sales managers, for example, are responsible for maintaining one or more field warehouses, and many field sales managers are responsible for a certain amount (sometimes a very great amount) of personal selling. Except to the extent that such activities are related to the central task of getting things done through the efforts of other people, however, they are not discussed in this volume.

For all of the similarities that exist between the responsibilities and problems of the field sales manager and those of his counterparts in other areas of the company's operations, the fact remains that the field sales manager is confronted with a number of special, if not in fact unique, problems resulting from the peculiar nature of the sales function. There are, in short, some very real differences between the management of salesmen in the field and the management of workers on a production line or in an office. (If there were not, there would be no need for such a book as this, for there are many excellent texts on management and supervision in general.) Some of these differences have to do with the remoteness of the field sales manager from company headquarters; others with the special characteristics of the salesman as a personality type; still others with the difficulty of planning sales activities (as compared with production activities, for example). Most of these differences are discussed in detail in the opening chapters of this book.

* * *

Depending upon how much experience he has had as a field sales manager and how much opportunity he has had to think about this experience, almost any reader, I suspect, will be able to point out what seem to him to be major defects in this book. Thus, the regional sales manager with 20 years of management experience might object that a good part of it is much too simple and fundamental, while the sales supervisor who was a salesman just last week, who has five men reporting to him, and who has no responsibility at all for recruitment and selection might object that a good part of it is much too complex, and quite irrelevant to his job. This, of course, is the price one pays for trying to design a book that will be useful to the many rather than the few. Some day, perhaps, there will be books for the regional sales manager in a large, decentralized industrial-goods company and for the branch manager in charge of supermarket accounts in a hosiery company. In the meantime,

it is hoped that the present volume will satisfy some of the needs of those who have already had experience in field sales management as well as of those who expect or hope or think they would like to be field sales managers.

If, for the seasoned field sales manager, this book does nothing more than make him think of himself as a manager—as a man whose primary responsibility is to get things done through the efforts of other people—it will have served its major purpose.

ALBERT NEWGARDEN

New York City
April 1960

Acknowledgments

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A. N.

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The Management Job

man'age-ment, *n.* . . . 4. the collective body of those who manage or direct any enterprise or interest.

Webster's New International Dictionary

Instead of thinking of "management" as an abstract term or of "manager" as a title, we must be able to see them clearly in all of their component parts. Instead of management's being what a particular management makes it, or a manager's being whatever a particular personality proves to be, management has certain common denominators regardless of where you find it. All managers have to observe certain basic principles and concepts, regardless of the nature of their responsibilities. This does not eliminate differences in individual personalities and varying contributions to the profession by individuals, but it does mean that all are working from a common base and with the same book of rules.

LAWRENCE A. APPELY: *Management in Action*

The Field Sales Manager

And His Place in the Organization

TO IDENTIFY the field sales manager in a going concern is ordinarily easy; to agree upon a standard definition of his duties is well-nigh impossible. In terms of identification, field sales managers are those line officials who operate between the sales force and the home office executives. They are most often known by such titles as "supervisor," "branch manager," "regional manager," or "division manager." Titles, however, have limited meaning. We can gain greater insight into these field sales management jobs by examining them through several sets of eyes.

To the top sales executive, for example, the local manager is his extension in the field—his "eyes and arms in the district," as one such executive put it. It is through the field management hierarchy that top sales executives maintain contact with their markets and their sales personnel, and it is through this hierarchy that communications flow between the home office and the territories.

Through the salesman's eyes, field sales management assumes new dimensions. Field salesmen operate in an unusual environment in

The author, Robert T. Davis, is Associate Professor of Marketing in the Graduate School of Business at Stanford University, Stanford, California. He was formerly Assistant Professor of Business Administration in the Graduate School of Business Administration at Harvard University, where he wrote the research study *Performance and Development of Field Sales Managers* (Boston: Harvard University, 1957).

which the local manager occupies a critical position. There is ordinarily considerable distance, both physical and mental, between the territorial salesmen and their company headquarters. Of necessity, therefore, the local manager is the company to his salesmen in the field—their only official link with that nebulous land of the Home Office. Not only does the manager personify company authority, he is the individual to whom the salesman must look for advice, encouragement, and advancement. It is axiomatic, then, that field sales management involves a highly personal relationship between the salesman and his superiors—a relationship which is the very core of effective communications.

Let us now step into the shoes of an introspective field sales manager. What do we see? Depending upon the requirements of our line superiors, as well as our own qualifications, we might see ourselves either as supersalesmen, ready to do battle with the most obdurate customers and to take over personally the toughest problems of our experienced salesmen, or as *supervising managers* responsible primarily for developing field salesmen and profitably managing a portion of the company's marketing program.

Thus, in perhaps too simplified terms, we as field sales managers can choose to identify ourselves primarily with salesmen or with management. Whatever our particular inclination in this regard, however, we will soon realize that in actuality we serve two masters: sales management and salesmen. It is our ultimate responsibility to bridge the two different worlds, with their two very different logics and environments, that these two masters inhabit. It is not for nothing that we are called "middle" managers.

The Critical Job of Field Sales Management

Effective management in the field, as a company objective, is more than a satisfying exercise in sound personnel practices—it is the lifeblood of sales success. The strategic position of field sales management becomes evident when we examine the major characteristics of most sales organizations.

In a very real sense, salesmen are "different." As compared with other company employees, they are subject to much more pronounced emotional ups and downs—not because they are peculiar individuals

but because of the nature of their jobs. The average field salesman works alone; alone he must bear the disappointments of the lost sale, the frustrations of the delayed sale, or, happily, the exhilaration of the well-earned sale. He is not in constant contact with his fellow employees; if he travels for extended periods, he doesn't even have a family to return to each evening. Thus, in addition to being the salesman's major contact with the company the field sales manager is the one person to whom he can turn for counsel and encouragement. For the salesman in the field, the local manager replaces the colleagues and constant inside supervision that the office worker takes for granted.

An equally significant characteristic of sales organizations is the fact that the field sales manager establishes the standards of performance and behavior for his men. Selling is a job replete with intangibles; there are no convenient dials to set, formulas to calculate, or tolerances to allow for. Selling is a relationship between people; as such, it can hardly be routinized or standardized. Hence, it is especially important that there be some standards of performance and behavior to guide the individual salesman. And it is the field sales manager who sets such standards—*his* expectations, *his* actions, *his* attitudes which establish beyond a doubt a working environment that either aids or hinders his subordinates. Make no mistake about it: A salesman's success, to a greater extent than many of us have imagined, depends upon the quality of his field supervision.

Finally, sales organizations are characterized by their dispersion. For effective top management direction, of course, it is necessary that the widely separated sales territories somehow be operated as a unit. Local market conditions must be identified promptly and considered in framing the over-all sales strategy. Company objectives and policies must be translated into effective local action. To these ends, the field sales manager is an intelligence unit of first importance.

These, then, are the reasons why field sales managers are essential. Their importance does not vary according to whether they work for a manufacturer, a service organization, or a distributor, nor does it matter whether they manage a local office, report to one, or, as in some cases, operate out of their own homes. In the end, probably the only common characteristic of field sales managers is that they supervise the work of one or more salesmen in a line capacity.

The Field Sales Management Hierarchy

If we accept standard business practice as our guide, it is possible to distinguish four major levels of field sales management—though it must be added in haste that many companies do not have all four. Starting from the top there are (1) regional or divisional managers, (2) branch or district managers, (3) supervisors, and (4) senior salesmen or sales foremen. The labels are less significant than the general functions they represent.

Regional managers are typically closest to the “policy-making” sales executives. From one point of view, the regional manager’s prime function is to represent headquarters in the field; from another, equally valid, point of view, his prime function is to represent the field at headquarters. From any point of view, it is the regional manager who actually bridges the gap between the home office and the field: Through him the headquarters executives derive almost all of their knowledge of customers’ needs, the acceptability of the company’s products, and the activities of competitors; through him local managers and the field sales force derive almost all of their knowledge of company objectives, policies, and plans. Obviously, his most important responsibility is to maintain close liaison with both headquarters and the field, his most important requirement to be able to think and communicate in both the terms of the home office executive and the terms of the field salesman.

In national companies, regional managers are responsible for overseeing the sales operations of multi-state subdivisions, establishing regional sales strategies, and insuring the effective execution of national policies. They are immediately concerned with the supervision and development of branch or district managers. (Regional managers may also be called *divisional managers*.)

Branch managers are primarily responsible for the operation of basically homogeneous sales districts. In the sales management hierarchy, they are the “doers”—the implementers, if you will—and are generally the interpreters of local market and competitive conditions. In the larger branches these managers supervise considerable non-selling personnel and related activities as well. (Branch managers are also commonly called *district managers*.)

Supervisors are those field sales managers who are charged with the