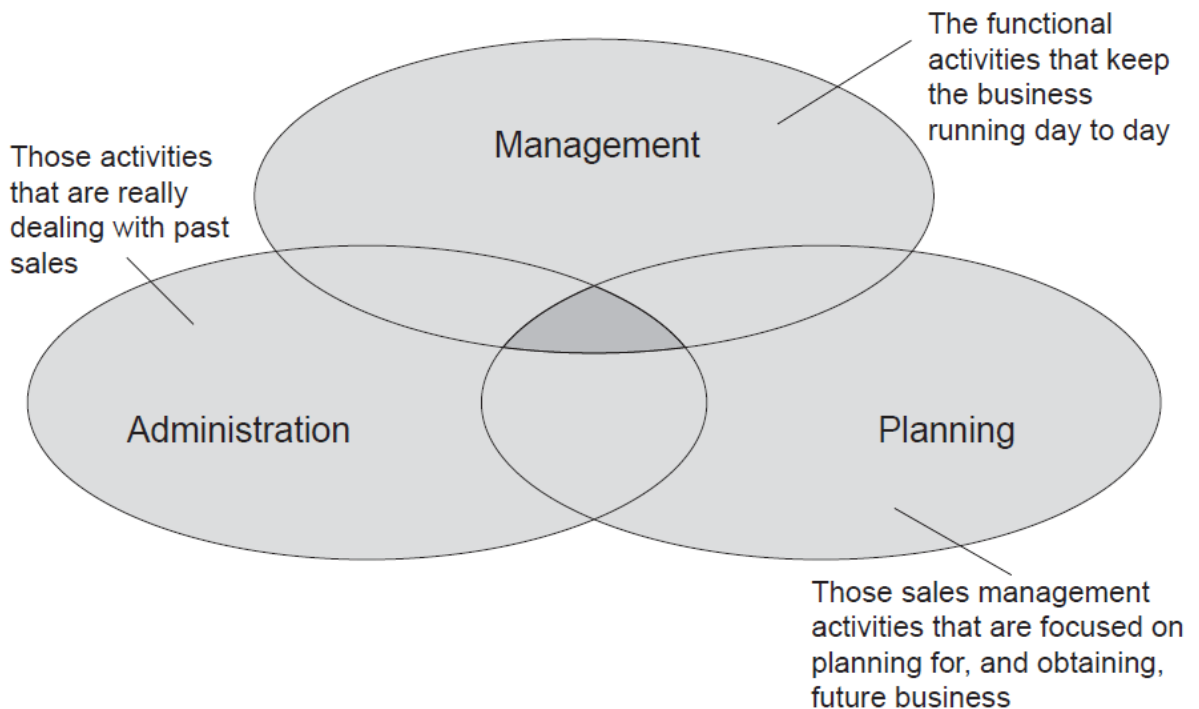


Roles and functions in the sales force

The sales organization, commonly referred to as the sales force, plays a key role in the growth, development, profitability and impact on customers (whether trade or direct customers) of most companies. It may represent only one department, or division, within a company organization, and often be relatively small in numbers in relation to total employees, especially in manufacturing industries, but it is a critical resource that must be nurtured, developed and motivated to fulfill its potential within the company organization and the external market place.

Key sales and marketing functional activities

The functional activities undertaken by the sales and marketing departments can normally be allocated into one of the three categories of **management** : **administration** : or **planning** :, as illustrated in Figure, and expanded in Table as shown below.



Functional responsibilities	
Sales	Marketing
Management	
<ul style="list-style-type: none"> ● Achieving sales volume requirements ● Achieving distribution objectives ● Product display/merchandising ● Call (outlet) coverage ● Sales force recruitment ● Sales force training ● Provision of feedback to sales force <ul style="list-style-type: none"> – bulletins – conferences – personal contact ● Trade terms <ul style="list-style-type: none"> – financial terms of trade – warranties and sale conditions – order size and delivery ● Performance measurement <ul style="list-style-type: none"> – sales volumes/values – call coverage – distribution – display achievements 	<ul style="list-style-type: none"> ● Brand management (including profitability) ● Market research ● Product performance and market share analysis ● Brand publicity including public relations, sponsorship, etc. ● Advertising and promotion
Administration	
<ul style="list-style-type: none"> ● Credit control ● Collection of payments ● Customer service and care ● Order processing ● Maintaining records on sales force activity and customer activity 	<ul style="list-style-type: none"> ● Packaging supplies (ordering and stock control if not an allocated responsibility of purchasing or production functions) ● Production scheduling (if not an allocated responsibility of another department) ● Regulatory compliance of product and packaging in domestic (and export) markets
Planning	
<ul style="list-style-type: none"> ● Sales forecasting ● Pricing policies and profit planning ● Sales promotions and competitions ● Sales force rewards and incentives ● Management training 	<ul style="list-style-type: none"> ● Sales & marketing forecasts ● Pricing policies & profit planning ● New product development ● New product test marketing ● Product design (physical attributes, size, shape, packaging)

Sales functional activities :

Table can be expanded with the following additional commentary on the main sales management functional activities.

Achieving sales volume : Once a forecast or target is set or agreed, the sales manager becomes responsible for its achievement. Achievement of sales forecasts is usually critical to achievement of the company's financial plans (profitability, ability to meet operating expenses, etc.).

Distribution : Product distribution targets may be set independently of sales volume targets, but higher sales volume is commonly a function of increasing distribution as well as generating more product off take or usage through existing users or outlets.

Product display and merchandising : These are traditional sales force functions in consumer product companies, and also with some industrial products distributed through trade stockists. Where off take is a factor of display, the salesperson should have display guide-lines and objectives, possibly for regular shelf space in the trade outlet (retail outlets, cash and carry stores) and for off-shelf promotional or feature displays.

The merchandising function may be performed by the sales force, or by separate team (possibly of part-timers) charged with that responsibility. Many consumer goods companies contract the merchandising to specialist companies that provide merchandising services to a range of suppliers.

Call coverage : This is the actual process of making physical calls on customers. Whereas company has a stable customer base, calling might be scheduled at some regular frequency relating to actual or potential sales (see later sections on journey planning), or to the amount of stock a customer can (or will) carry.

Sales recruitment and training : The identification of suitable persons for a selling position, and their subsequent training, must be a fundamental responsibility of sales managers. Clear job specifications and job holder profiles should be developed, based upon qualities and skills known to be relevant to performance in the company's trading environment.

Once suitable persons are identified and recruited, there are three levels of training that the sales manager needs to incorporate into his or her management activities:

- initial induction training, likely to include industry and product knowledge, as well as basic selling skills
- ongoing field sales training
- supporting training provided at sales meetings and conferences.

Provision of feedback : It is essential to communicate achievements, objectives, plans, programmes, and policies, in order to provide support and motivation. Sales managers typically hold (area or national) sales meetings at regular frequencies to provide a feedback forum and to give sales team members a chance to interrelate, and these can be supplemented by sales bulletins or newsletters.

Trade terms : Marketing and finance departments will usually have an input to accompany's trade terms. The sales manager should be the expert on the custom and practice within his or her markets, knowing industry norms, and constantly reviewing competitive pricing, trade terms, and promotions.

Performance measurement : Statistical sales performance measures must relate sales achievements to targets, plans, and budgets, and form part of a programmed of rapid feedback to salespersons. Performance statistics need to be broken down to give measures for each territory and customer, and, wherever practical, should be benchmarked against comparable external data, e.g. for the industry or product category. Comparative figures for performance against plans often cover:

- **sales volumes** : by product and customer
- **sales values** : by product and customer
- **Profitability** : by product and customer (not measured often enough!)
- **Call coverage** : achieved versus the scheduled or optimum coverage as related to sales

- **Product distribution** : achieved by product and sales territory, or by target market sector
- **Display** : achievements by product, territory, etc., where this is a relevant measure for consumer products.

Credit control : This functional responsibility is often shared with a section of the finance department. In the final analysis, however, it must be accepted as a sales management responsibility to collect overdue payments, as the sales force are involved in selecting customers and advising on their suitability for credit.

Collection of payments : In most developed markets payment for goods despatched is made by cheque, or direct bank-to-bank transfers. Late payers are usually reminded by a letter serving as a *polite reminder*, followed subsequently if payment is not made by more terse *chasers*. In some markets salespersons traditionally collect payment while calling on customers, but this is not ideal as it distracts from the salesperson focusing on selling, and may bring a negative atmosphere into what should be a positive environment.

Customer service and care : This function has grown in importance over recent years, as suppliers work not just to meet customer expectations from products and service, but to exceed them. This may include a very broad range of activities, from providing product leaflets and information, to answering queries about where orders are in a supply pipeline, to provision of after sales service and technical support.

Order processing : This activity also might fit within a sales organization, within customer service, or possibly a separate distribution department. Wherever it is misplaced as an activity, its function impacts on the selling activities, as salespersons and their customers clearly have particular concerns about the speed and accuracy of processing orders, and the management of order processing from all stages through collection (by a sales call or telephone call) to delivery and payment.

Maintaining activity records : The sales force needs to have information on its customers and its own activities. Most companies have a customer record system, such as customer card where the salesperson records all customer details and sales history, call dates, etc. Salespersons should have information that shows when calls are scheduled or have been made, and the results, as well as recording sales objectives for each customer.

Sales forecasting : While this is a function that often overlaps with marketing, sales managers do have a key contribution to make to the forecasting and planning process, notably in relation to sales volume and value estimates, in establishing distribution and display objectives, and in setting budgets for a sales organization that can achieve its objectives.

Pricing policies : The marketing and sales departments will both be closely involved in developing and implementing market pricing policies, to ensure correct positioning versus competitors' products while also satisfying company profit objectives.

Sales promotions and competitions : While a marketing department might initiate much tactical promotional activity, in support of strategic objectives (e.g. aimed at increasing distribution, display, and user/consumer trial), some promotional activity aimed at improving performance against the same key result areas might be under the control of the sales manager alone, such as sales force incentives and competitions.

Sales force rewards and incentives : The sales manager (often with advice from a human resources department) will have responsibility to ensure that rewards and incentives promote a high level of morale, motivating achievement of goals and

objectives, encouraging excellence, and developing loyalty amongst the good performers. While this could be seen as a management function, I prefer to assign it to planning, as reward packages have a great bearing on future success.

Sales management training : While many sales managers recognize the need for training their sales teams, they often neglect their own development. Management training, to meet the future needs of the business and demands of sales management jobs, is a key activity. A well-trained team of sales managers will contribute to their own further self-development, to company performance, and to the morale and training of salespersons.

(<http://e-university.wisdomjobs.com/sales-management/chapter-1643-309/roles-and-functions-in-the-sales-force.html>)