

# MARKETING TEAM IN THE FIELD

Don't Market by the Numbers  
Chart Your Own Course



Sending marketing representatives into the field, to meet with account teams, customers, and to see the product in use, is a very effective way to quickly immerse the individual in the sales cycle experience. While it is infinitely beneficial in developing the understanding and shared experience with the sales team, it should still include parameters and goals, to ensure that the time is well spent, and that it benefits extend beyond the actual event.

This is inevitably a personal growth opportunity and experience, but it is critical to keep in mind that this is also a work related trip, and therefore there are expectations beyond just being there for the outcomes of this trip. That requires planning and setting expectations, goals.

## Before the Trip

Plan the trip beforehand. Aside from the logistics, there are reasons for going,

### Set the Purpose – The Why

Set a clear understanding of WHY the trip, visit, field experience is taking place. There are specifics to the trip, but the overall is to understand the unique, distinct reasons for this specific trip at this specific time. This should be communicated clearly.

- Meet the teams in person, face-to-face
  - Account Teams
    - Understanding AMs audience
    - Meeting and aligning with AMs
  - Customers
    - Teachers / Users
    - District leaders / administrators
    - Students
  - Potential Customers
- Understand different perspectives, needs of each
  - Learning about products actually in use
  - Hearing from users
  - Seeing reactions
- Product Exposure
  - See how the product is actually used
  - See how the product is actually received
  - See/Hear the outcomes

## Set Objectives – The What

While the purpose of the trip is more general, the objectives of the trip are more defined in the clarification of the expected outcomes, specific needs for each trip. These are the tangible outcomes of the trip.

- What is the expected outcome?
- Are there specific needs the company has
  - Photo types
  - Quotes
  - Ideas
  - Unique perspectives
  - Statistics

## Set the expectations – The How

Giving each person an idea of what the trip will be like, how it will go, goes a long way to clarify any concerns and reinforce the goals and objectives of the trip. It is recommended that each person speak with another individually who has GONE on these trips, and also to review with the account teams you'll be meeting with to get THEIR expectations and an overview of what the trip will be like. This is separate from the logistics and details, more of getting a sense of what will take place. It sets the stage to understand the frame of mind and types of experiences you will have.

- What likely happen
- Possible happenings
- What to watch for
- What your role is: watch, listen, scribe, photo/video, assist, ASK QUESTIONS

## Prepare

Be prepared for the trip, so that you don't forget what you want to learn, see, hear about. The best way to do this is to have a specific, dedicated Trip Journal. This should remain YOURS, so you can keep any of your personal thoughts, comments, notes, experiences, but will form the basis of your "output" post trip. Keep it with you at all times, and use it regularly. Before setting out, you should have notes ready that include:

- Create a list of questions for AMs, customers
- What do YOU want to get out of it
- What do you THINK you'll experience, see, hear?
- Full details and times of where you're going, who meeting with

## During the Trip

You have all the plans, goals, and objectives, and your Trip Journal, but when you're actually there, working, on the road, everything can change and the unexpected occurs. That's ok. That's why the Trip Journal is helpful, to keep you on track for some things, and to document the other needs. The experience is often the important part, so that should be first and foremost in the efforts. But don't lose sight of the rest.

- Take notes
- Keep personal experiences, reactions, reflection, ideas in the journal
- Document stats, quotes, even describing scenes while people are engaging with the product or seeing it being used for the first time.
- Take photos
- LISTEN

## After the Trip

Armed with your Trip Journal and resources, complete a trip report/summary, followed with the specifics below.

### Summary

Start with an overall summary of the trip and what you got out of it. A good exercise is also to develop a preliminary case study for each school/district visited, including stats, performance outcomes, quotes and anecdotes. Also include concerns, challenges that the AMs faced or are facing, and how they are or will overcome them.

- Top Takeaways Overall
  - Any new ideas, opportunities you found
  - Overall impression of the region (need wise)
  - Anecdotes
- Top takeaways from each location visited (the case studies)
  - Administrators
  - Teachers
  - Students
  - Potential customers (if there)
- Top takeaways overall with AMs
  - Language they use
  - Needs and obstacles they face
  - How Marketing can improve these

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## Next Steps

Then the real work begins, acting on the learnings. Develop your approach, work with your teams, and define the objectives, approaches, expected outcomes, create your content, and set up the tracking and reporting.

While you want to make use of your content and learnings immediately, also develop a plan to incorporate other learnings from other trips, to maximize the success, eliminate outliers, and create reusable resources and approaches across different regions, customer types.

- Marketing approach
- Account team
- Other

## Where are your resources?

- Notes (these can be included in the report summary, as an abridged version of your Trip Journal)
- Photos
- Video