

Three-Day Field Sales Trip

BLUEPRINT BY WINNING BY DESIGN

We are currently facing two problems:

1. A shortage of qualified leads
2. A stagnation of deal flow as customers delay their decisions

We are observing this trend across all verticals and segments.

This is not unexpected; historically, most organizations heavily relied on inbound leads, and their outbound initiatives were relatively straightforward, often based on email sequences. However, these efforts have ceased to produce the necessary results to sustain the necessary pipeline.

This blueprint lays the foundation for an outbound strategy using a field sales approach. This approach has been deployed for decades by Enterprise sales representatives. But with many teams idling under the current circumstances, there is a way to make these efforts effective across more than just your Enterprise team, when executed efficiently as a 3-day trip with multiple meetings and events. The intention is to quickly invigorate activity within a region, during a short trip, using operational expense budgets to support in-person communication. This method stands out from competitors who continue to rely primarily on emails to secure online meetings.

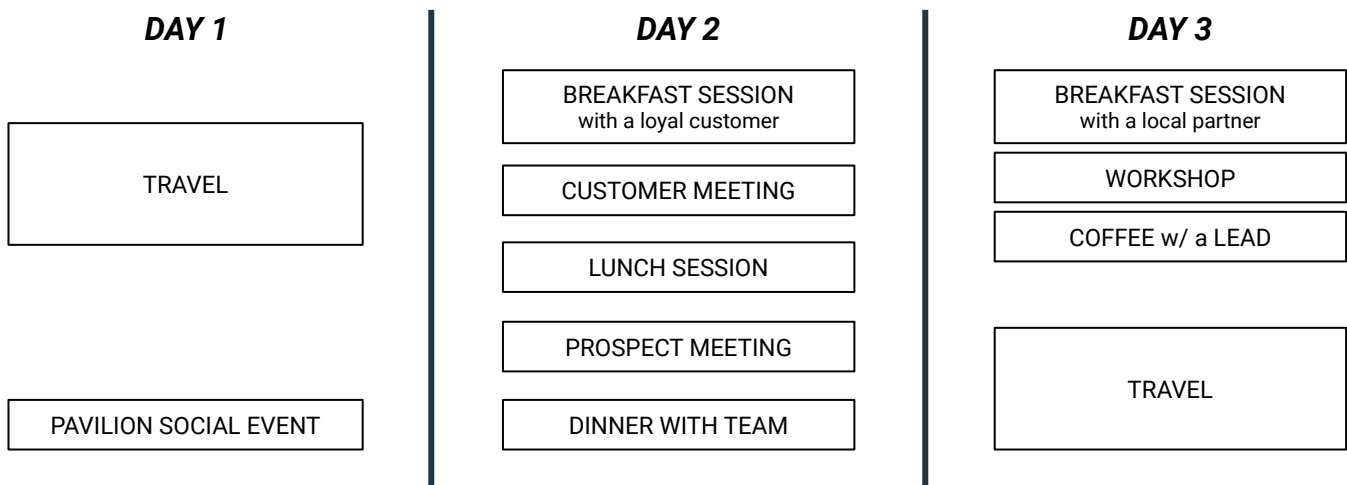


Figure 1. Sample agenda of a three-day trip

The Key Steps

Step 1: Set the Anchor Meeting

Schedule an In-Person Meeting with a Customer 2-3 Weeks in Advance.

Initiate a face-to-face meeting with one of your most important contacts, to be held 2-3 weeks ahead. This meeting can be with a prospect, an existing customer, or a strategic partner. Select a city with a recognized concentration of customer activity, like New York or London, for the meeting location. This pivotal meeting serves as the 'anchor' or the foundation of the strategy.

Step 2: Stack the Itinerary

Maximize your time in the region with an array of events.


Diversify the trip by organizing various events around the anchor meeting; some can be one-on-one, others can be with a group, like a social or networking gathering. Here are some examples:

- **Breakfast Meeting:** Arrange a morning meeting with a customer at a coffee place conveniently on their route to work.
- **Lunch Gathering:** Have lunch with a prospect at a stylish restaurant.
- **Afternoon Social:** Arrange a 4 pm social event for Pavilion members in the region, also extending invitations to customers and prospects for networking.
- **Team Dinner:** Plan a dinner with local colleagues in the area. Reinvigorate the teamwork!

Step 3: Mobilize across all levels of your company

Engage your Executive team in supporting the effort to populate meetings and events. This often transforms into a significant customer-focused initiative. What does this look like? Create a short message for your Executive team summarizing your trip with the following:

- **Purpose of trip:** "I'm heading to Chicago in order to meet with Acme, with the goal of expanding our deal with them that we currently have in the pipeline from \$50K to \$200K"
- **Dates:** "I'm planning on being in the Chicago area from Sept 12 through Sept 15."

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- **Which type of contacts you'd like to meet with:** "I'm hoping to meet 1:1 with more of our Tier 1 ICPs while I'm there, and also invite them to the Pavilion gathering happening that same week."
 - **A specific ask where you need their support:** "Are there any of your contacts at the executive level in the area that you would recommend I meet with? Here is a quick message that you could send them in order to put me in touch with them..."

Collaborate with the Customer Success (CS) team to identify local customers who can join events or require personalized attention through one-on-one sessions, using a similar approach as above.

Invite employees and colleagues that live in the region to join you for dinner. The event date now becomes a rallying point on everyone's calendar.

Step 4: Be smart about booking travel.

Coordinate travel arrangements approximately two weeks ahead of the departure date to keep the price low.

Step 5: Announce your trip to your broader network.

Use platforms such as LinkedIn to share insights and updates about the upcoming trip, generating anticipation and potential engagement from the targeted audience. Let the rest of your network know that you'll be in the area; there may be unexpected contacts that are in that region that you weren't aware of.

After the Trip

- 1. Take action on the follow-ups right away.** Implement a structured approach for recording your action items from each meeting and event, and following up on them quickly during and after the trip. Set aside the day after your trip to put these actions items in motion; this is part of the foundation of effective relationship management.
- 2. Share insights via a Field Visit Report.** Feed crucial customer insights back to the rest of your GTM team and your executive team via a short Field Visit Report. This is a key way for the rest of the team to understand what is of importance to customers and prospects, so that

they build those insights into messaging, campaigns, and customer communications. This could be a simple Slack message or an email.



- 3. Evaluate and iterate:** After the trip, assess the impact of the strategy by analyzing the generated leads, engagement levels, and any resulting conversions. Use these insights to refine and enhance future field sales endeavors.

Why is this approach so effective?

- It emphasizes the importance of personal connections: Face-to-face interactions foster deeper relationships and establish stronger rapport with customers, prospects, and local team members.
- It sets you apart from your competition, most of which will be minimizing travel in order to save costs, and therefore missing out on these crucial in-person connections.
- It develops in-person networking skills across your team, to complement online networking.

By orchestrating the *Three-Day Field Sales Trip*, you will inject vitality into the sales team, revitalize customer relationships, and reinvigorate lead generation during a time when direct interactions hold unparalleled significance.



ADDITIONAL RESOURCES

GTM Impact Office Hours

Get guidance on how your team can achieve your revenue goals from a Revenue Growth Architect from Winning by Design:

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