

HOW TO BE A **GREAT** ACCOUNT MANAGER

Ask your buyer the questions no else asks

1. How can I be the best long-term partner to you?
2. How do you (the buyer) prefer to communicate; email, phone calls, text, in person?
3. How frequently do you want to see me? What is the best day & time to reach you?
4. Do you prefer to make appointments or do you have open call times?
5. I want this placement to be successful, what can I provide you to make that happen: staff training, demo, marketing materials, shelf talkers, or a sample bottle?
6. Be present. Sometimes just being present will solidify sales. Buy a bottle. Support the account. Deplete!!

Know the Numbers

Most on premise accounts will mark up the wine 2.5 or 3 times what the wholesale price is. Know the numbers in each market! It is perfectly acceptable to ask what their mark up is. By knowing the numbers, you can often nail a placement. Check if the wine fits within a pricing or AVA niche they don't have. By knowing the numbers and the product, you can easily tell if it won't fit; i.e. too expensive!

HOW TO PREP FOR A MARKET VISIT

Preparation

1. Contact sales manager and calendar a market visit.
2. Find out which vintage the state has and the inventory. Assess which vintage to pack.
3. Get the pricing ahead of time. Some markets will have different tiers of pricing. Find out what the front line price is per bottle; per 3 cases; per 5 cases.
4. Try to get an itinerary or contact list of the reps ahead of time.
5. Find out a good hotel location to coordinate with the reps you will be working with.
6. Book your travel to fly in the day prior to get settled. Tuesday – Thursday you should be in the field with reps. Friday: book a sales meeting.

Bring with you

1. Bring your "A" game! The most important thing you can pack is a good attitude.
2. Pack an ample stack of business cards.
3. Marketing materials: shelf talkers, tasting notes, sales books and wine keys.
4. Samples of the product or arrange to have the distributor pull them for you.

During your visit

1. Check the bottles ahead of time, before you go into an account. If it's corked or flawed, it's really unprofessional.
2. A good market visit will consist of at least 5 good accounts that are potential buyers throughout the each day. It should usually be a mix of on and off premise; appropriate to carry Oregon pinot noir. 5 good accounts are better than 10 bad ones.
3. No matter how the day goes, you are there to bond with the sales team. Sometimes an off day will happen. Give them the benefit of the doubt and treat everyone with gratitude. They are making room in their schedules to accommodate us.
4. Plan to take the reps to lunch. You typically pay. You may have to host drinks & dinners also.

ASK FOR THE SALE

You can do this by using terms, "Will this wine be a good fit your account?" If they buy, "When would like us to send it?" And, "Would you like any printed materials?" For on premise, offer a sample bottle for staff training. Offer to conduct it if you are close by. We are a new brand. We want to be in every employee's mind when they are recommending wine to guests. Remember, a wine buyer can't sell to every table. You want the servers to love your wine. Give them the opportunity.

After your visit

1. Prepare immediately your Market Recap Report. Send this to the distributor / managers identifying which accounts purchased and which need follow up.
2. Analyze the sales reports when they come in and adjust your market report to reflect what actually sold and how much.

HOW TO PREP FOR A DEMO

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