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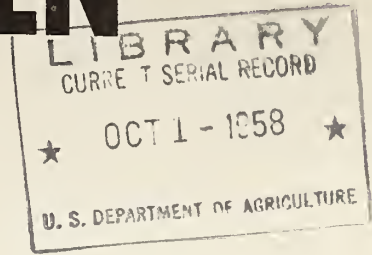
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The use of

FIELDMEN

by



Wholesale Food Distributors

and

Affiliated Retailers

.....
*A Study of Improvements in the
Marketing of Agricultural Products*

U. S. DEPARTMENT OF AGRICULTURE

Agricultural Marketing Service • Marketing Research Division
Washington, D. C.

PREFACE

This is the fourth of a series of reports concerned with wholesaler-retailer relations. Previous reports were "How Some Wholesale Grocers Build Better Retailers," Marketing Research Report No. 12; "Methods of Handling and Delivering Orders Used by Some Leading Wholesale Grocers," Marketing Research Report No. 13; and "Views of Independent Grocers on Wholesaler-Retailer Relations," Marketing Research Report No. 42. The objective of the research is to find ways wholesalers and retailers can cooperate and thus hold down the costs of food distribution. The study on which this report is based is part of a broad program of research aimed at reducing the costs of marketing farm products, through the various stages of the marketing system.

The sales volume of retail food stores participating in wholesaler sponsored groups has increased rapidly in recent years; such stores now account for over 40 percent of the total sales of retail food stores. Trade estimates place this volume at \$18 billion. Research that contributes toward more effective cooperation between the wholesale food distributor and retailer can materially help hold down the cost of operation at both levels of the marketing system.

Close coordination of the wholesaler-retailer functions makes savings possible through: (1) The elimination of the salesman's function and cost for the wholesaler; (2) larger (and fewer) orders by the retailer with attendant savings in the cost of processing orders and in assembling and delivering the merchandise; (3) group advertising, with an attendant reduction of unit advertising costs; (4) the spreading of costs among many retailers for essential professional services such as store engineering and accounting, thus making such aid available and less expensive to individual retailers. These savings more than offset the cost of the fieldmen who help achieve closer wholesaler-retailer cooperation. Savings in marketing costs are usually reflected back to the farmer in better prices for his product, or to the consumer in lower prices, or partially to each. More efficient marketing, therefore, benefits all--producers, processors, distributors, and consumers.

September 1958

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The study was made under the general direction of R. W. Hoecker, head, Wholesaling and Retailing Section, Transportation and Facilities Branch.

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THE USE OF FIELDMEN BY WHOLESALE FOOD DISTRIBUTORS
AND AFFILIATED RETAILERS

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SUMMARY AND CONCLUSIONS

One of the most significant developments in food distribution has been the growth of food retailing through voluntary associations of retailers and wholesalers. Fieldmen, employed by the wholesalers to help retailers operate more efficiently, are an important part of the new development.

Teamwork between the wholesale food distributor and retailers has taken new forms in recent years and, although there are considerable differences in the operations of small and large wholesalers, common elements of the new pattern are: (1) Closer cooperation between wholesaler and retailers, with the wholesale food distributor assuming a stronger leadership; (2) wholesalers concentrating on making good accounts better, helping their retailers to achieve supermarket status and to manage these large operations effectively; (3) the fieldman's task increasingly focused on helping the retailer become a more effective and efficient operator; the fieldman is no longer an order taker for the wholesaler but a consultant for the retailer and a coordinator of the wholesale-retail functions.

A study was made of leading wholesale food distributors who sponsor voluntary retailer groups to determine ways in which the fieldman can be a more effective part of the wholesaler-retailer team contributing to lower marketing costs. These wholesalers were located in the central and eastern portions of the country; their sales volume varied from \$5 million to over \$100 million annually.

Among the conclusions reached in the study on ways of increasing the effectiveness of fieldmen were: First, that the wholesaler management needs to decide what the basic objectives of the firm are and what policies should be followed to achieve these objectives. It is necessary for a firm to have certain basic policies in order to plan field operations and fieldmen's functions effectively. Plans for the field operation start with a detailed job description outlining the role of the fieldmen in the organization. Management should inform the fieldmen what their duties are, why they need to be performed, and guide them in performing these tasks.

Among the specific tasks that wholesale food distributors assigned to their fieldmen were: (1) Building sales at both retail and wholesale by fostering greater cooperation in a joint merchandising program; (2) helping the retailer build a store personality; (3) helping to increase the efficiency of the store's operations; and (4) helping the retailer improve and expand his facilities.

A second conclusion was that the activities of the fieldmen should be systematically supervised. Among the wholesalers studied, supervision included planned 2-way communication, directing and planning the fieldmen's workweek, definite criteria and procedures for evaluating fieldmen performance and programs for training fieldmen and developing their competence. Weekly merchandising meetings, widely used among the wholesalers surveyed, are a good means of communicating company policies and programs to the fieldmen but they need to be conducted or supplemented in a manner that will facilitate 2-way communication. Fieldmen report forms can help management know what the fieldman does at his retailer stops and at the same time remind the fieldman of the things management thinks are important in his performance. Evaluation of fieldman performance has grown more complex and at the same time more important for a successful field operation. The important elements of an effective system of fieldman evaluation are (a) definite criteria for evaluations; (b) advising fieldmen on the criteria and the procedure for making evaluations.

Third, the fieldmen could improve their work practices by further training. While many fieldmen were familiar with food merchandising there appeared to be some lack in knowledge about store operations and management generally. Some of the large wholesale food distributors emphasized the importance of training fieldmen in the operations of perishables departments and in such aspects of store management as (1) Accounting practices and the analysis of operating statistics; (2) principles of work simplification; and (3) working relationships--the process of getting work done through employees.

Fourth, wholesaler management can facilitate the work of fieldmen and the cooperation of retailers with the voluntary program by helping the retailers to see the program as their own. Most wholesalers studied felt that efforts should be made to obtain increased retailer identification with the voluntary programs. It also seems desirable for wholesaler management to define more clearly what the retailer needs to do in cooperating with the voluntary program, and to simplify the means of communicating this information to him. By simplifying and combining various retailer bulletins, clearly suggesting to retailers methods for handling each promotional item and providing them with the material for doing so when appropriate, wholesalers can significantly improve retailer cooperation in the merchandising program.

INTRODUCTION

The movement toward food retailing through associations of retailers and wholesalers has accelerated during recent years. The emergence of such groups was brought about by the belief of many wholesalers and retailers that their mutual financial well-being would be advanced by closer cooperation. Retailer-wholesaler associations have taken many forms. Typically, the pattern in early

years was one of loose association in which wholesale grocers made various merchandising and operating services available to retailers but exerted little effort to assure retailer use of them. Wholesale food distributors hoped their affiliated accounts would purchase all they could from them, but in few cases was it expected that the associated retailer would patronize only the one supplier. Moreover, wholesalers tried to serve as many stores as possible, whether they were association members or not.

Wholesaler-Retailer Relations and the New Type of Fieldmen

In recent years, the relationship between a growing number of wholesale food distributors and retailers has changed. Key elements of this change are: (1) The development of independent supermarkets as well as smaller stores affiliated with the wholesaler. Wholesalers are helping these independent retailers achieve supermarket and superette status and to manage these larger operations effectively. (2) There are stronger ties and closer cooperation between the wholesalers and the retailers; wholesalers are assuming greater leadership in relationships with affiliated retailers. (3) Wholesalers are concentrating their efforts on making good accounts better (though some continue to serve smaller accounts on a fee basis or to supply them through cash-and-carry branches).

This new orientation of wholesale food distributors and associated retailers is perhaps best characterized by the changed attitudes of wholesaler top management and the new role of wholesaler field representatives. The wholesalers studied now see their function in relation to the retailer not as one of selling to retailers at a profit but of selling through retailers for mutual profit. The new directions being taken by some of the leading wholesale grocers have required a basic change in the kind of field representatives they employ. Previously, the role of the wholesaler salesman was well defined. It was his job to sell as much merchandise to the retailer as he could, particularly items on which the wholesaler made a good margin. Wholesale food distributors employed men who were well suited for selling and many paid them a straight commission. Accordingly, in the short run, it was to the salesman's advantage to be primarily concerned with selling as much as he could to the retailer, though he was aware that in the long run the goods sold to the retailer would have to be sold by the retailer.

With the new approach to wholesaler-retailer relations, wholesalers are describing their fieldmen as "sales supervisors," "sales-service men," and "field representatives" in an effort to obtain more general recognition that these men are not old line salesmen. The fieldman is no longer merely an order-taker for the wholesaler; he serves as a consultant for the retailer and a coordinator of the wholesale-retail functions. His principal task instead of selling to the retailer, is to help the retailer sell to his customers. In short, the fieldman is a principal factor in an integrated marketing program. This new approach recognizes that retailer patronage will not necessarily result in increased wholesaler volume unless the retailer moves a larger volume through his store. (If the retailer buys all his merchandise from the wholesaler but rapidly loses ground competitively, the wholesaler suffers as well as the retailer.) This new approach further assumes that retail patronage can be best obtained by being earned--through service to the retailer.

Purpose and Scope of Study

The new concepts of wholesaler-retailer relations and the new role of fieldmen have been developing rapidly during the past decade. Accordingly, a review and analysis of field practices among wholesalers who are in the vanguard of this movement are in order.

This report is based on 13 case studies of leading wholesale food distributors, all of whom work with an associated group of retailers. Some of the associations have moved further in the direction of a closely integrated system than others. Wholesalers in the study each had sales volumes that varied from \$5 million to over \$100 million annually. Some of the wholesalers are principally engaged in handling dry groceries, others also supply meats, produce, and frozen foods to associated retailers. The report is not intended to be a cross-section of the operations of wholesaler-retailer associations throughout the country; it does cover practices of those representative of the trends in wholesaler-retailer relations. The practices described here are those now used by the groups studied. While the emphasis is on the better practices found, they are not necessarily the best for individual firms or for the industry.

The case studies are based on discussions with principals in each company. They include conversations with the fieldmen (and their supervisors) about their work. They also include direct observations of fieldmen in organizing their daily itineraries and in making trade calls, (and a comparison of what they said with what they actually did).

The purpose of the study was twofold. First, to describe and evaluate some of the current practices among fieldmen of leading grocery wholesalers. Second, to identify the better practices and areas where further improvements might be made. The intensive study of a representative wholesale food distributor described in the last chapter of this report was conducted to show how certain practices may be adapted for use by other wholesalers.

PLANNING AND ORGANIZING FOR FIELD WORK

Establishing Wholesaler Objectives and Basic Policies

The setting of company objectives and basic policies is prerequisite to organizing the work of fieldmen by the wholesalers. These are the foundations upon which the field staff is built--the number of personnel, their caliber and special experiences, and the functions for which they are responsible. This kind of planning and development was especially evident among the several firms studied which had recently undergone a major company reorganization. While it was less evident among smaller companies where formal reorganization had not taken place, several of these recognized the need for reviewing basic company goals and policies as preliminary to evaluating their field operation. Wholesale food distributors usually broke their objectives down into periods of 1 to 5 years, with intermediate objectives set for interim periods of 6 months to 1 year. For example, one wholesaler had set his goal for the next 3 years as a \$5 million dollar increase in sales. This was first broken down into 1-year periods, and then between gains from the current group of

affiliated retailers and gains projected from the addition of new customers. With these kinds of objectives before them, management and fieldmen were in a position to assess the kind of effort needed each year, and to estimate the progress being made to achieve their goals.

Basic company policies follow from the objectives. For example, a wholesale food distributor who wanted to secure a major portion of his increased sales from existing accounts helped present retailers improve their store facilities so they could win an increased share of the potential business in their respective trading areas. From this objective also came a company policy of a more aggressive merchandising program. On the other hand, a wholesale food distributor who wanted to gain increased sales through the addition of new accounts had to assist retailers in seeking and securing new locations for the establishment of new supermarket-size retailers and to intensify efforts to win over potential accounts within the wholesaler's trade territory.

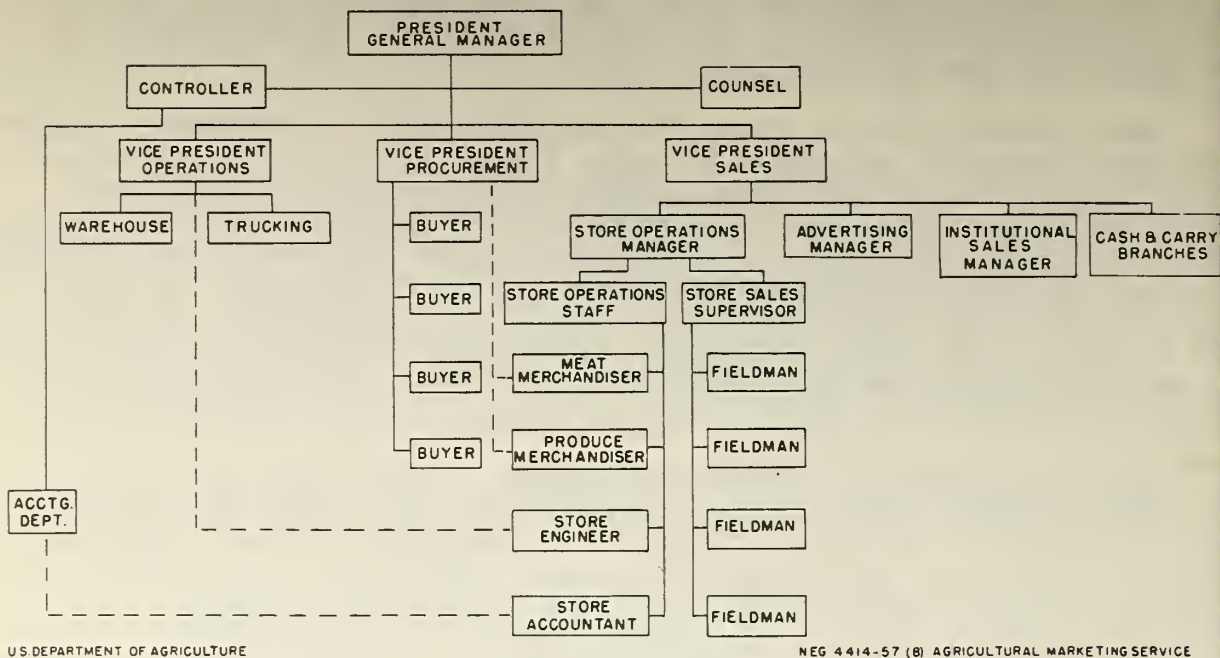
Since the wholesaler-retailer relationship and the field work are so important in modern grocery wholesaling, planning these phases of the wholesaler's business is the responsibility of top management in every organization studied. In most of these organizations, the officials setting policies on wholesaler-retailer relations and field work included the following: (1) The head of the company; (2) the general manager; (3) the sales manager; (4) store operations manager; and (5) the advertising manager. In some wholesale organizations this group is designated as the top executive committee of the company. In others it shares an equal position with the executive committee responsible for overall wholesale operations. In addition to a formally organized executive group, policies affecting wholesaler-retailer relations and field work may be formulated by individual members of the executive committee, and informally agreed to by several members of the group. An organization chart of a typical wholesale food distributor, with special attention to that part dealing with field work, is indicated in figure 1.

Fieldmen in the Wholesaler's Organization Chart

Although not all wholesalers in this study maintained an up-to-date organization chart, most have a clear picture of where the fieldmen fit into the company's operations. In most cases, the fieldmen report to a "sales manager" who, in turn, usually reports to a vice president or other top management official (fig. 1). In most of the firms, the fieldmen continued to be part of the wholesaler's sales organization. Some wholesalers made a distinction between fieldmen who were concerned with general store operations and specialty men whose primary concern was to help retailers in meat or produce merchandising. However, whether general fieldmen or specialty merchandisers, they are usually part of a sales manager's staff.

A closer relationship now exists between the field function and other functions of the wholesaler. Fieldmen now have broader responsibility than when they were concerned primarily with getting the retailer's order. In most firms studied, the fieldmen were concerned with the warehouse operations and deliveries, weekly merchandising programs, price policies, and advertising because all had direct bearing on the retailer. On some organization charts,

ORGANIZATION CHART OF WHOLESALE FOOD DISTRIBUTOR



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NEG 4414-57 (8) AGRICULTURAL MARKETING SERVICE

Figure 1.

dotted lines from the various wholesaler operations and service personnel to the sales supervisor and his men point up the fact that virtually the entire organization backs up the field effort (fig. 1). The extent to which this is so is usually related to the size of the wholesaler; the larger wholesalers are more likely to give their fieldmen the support of a technical staff.

Assignment of Fieldmen's Functions

The specific functions assigned to fieldmen varied considerably among the wholesale food distributors surveyed. The most important factors influencing fieldmen assignments are the size of the wholesaler and the food lines he carries, and the size and kind of affiliated retail stores he serves. In the smaller stores, the field function is limited primarily to merchandising of dry groceries; in the larger stores, merchandising of perishables and nonfood items are frequently an important part of the fieldman's job. The increasing importance of such items as frozen foods and health and beauty aids, and the vogue of merchandising related items from different departments and of store-wide promotions has made it more difficult for a fieldman to do an adequate job when he represents a wholesaler who sells only groceries. This appears to be the case even where the wholesale grocer makes special arrangements with vendors for store delivery of products he does not stock. It is difficult for fieldmen to give guidance for overall store merchandising and development when member stores have several suppliers.

Because of the rising cost of assistance by fieldmen, it has been necessary for wholesale food distributors to give up old-style selling. In one medium-sized firm, 4 of the 9 fieldmen deal entirely with larger, cost-plus accounts; while the other 5 work with both large and small accounts. The fieldmen make no calls on some of the largest accounts and share other large store calls on a somewhat informal basis with junior executives of the company. This particular wholesaler recognizes the inadequacy of his organization structure and intends to complete the transition this year.

Common functions of the fieldmen as reported by the wholesalers studied are:

1. Improving retailer cooperation with the joint merchandising program. The mechanics for accomplishing this vary among wholesalers: In some instances fieldmen review the order when they pick it up at the retail store and check whether promotional merchandise has been ordered; in others, reliance is placed on selling the retailers the value of cooperation rather than the individual items in the promotion. In some cases cooperation means getting retailers to put up window banners or use in-store signs; in others it means, additionally, participating in a group newspaper advertisement and distributing handbills.

2. Offering constructive information and advice on store operations. The emphasis is away from the hand-shaking, back-slapping, "good will" ambassador to that of competent counselor on store operations. There are wide variations in the kind of advice fieldmen are supposed to render--from suggesting a new item or new arrangement of existing shelf displays to active assistance in hiring new personnel and purchasing new equipment.

3. Checking condition of stores. As part of their new role, fieldmen assist the store in checking on such store conditions as cleanliness, support of the merchandising program, adequate level of stock and, in some cases, freshness and appearance of such perishables as produce, meats, and dairy products. Sometimes reports are reviewed with the retailer, sometimes with the sales manager, and sometimes with both.

4. Locating leads for new accounts and new locations for stores. Because fieldmen are out covering a territory and talking with retailers, they are in a position to learn about potential new accounts and promising store locations. This added function is part of the increased responsibility given fieldmen by some wholesalers studied.

5. Encouraging and aiding retailers in their progressive development as merchants. Most wholesalers surveyed now give their fieldmen the added responsibility of encouraging and helping their retailers improve their knowledge about supermarket operations and facilities, and, generally to become more effective managers. This often includes recommending retailer attendance at wholesaler and trade conferences, suggesting expansion of facilities or lines of goods carried, or both.

6. Facilitating communications between retailer and wholesaler. The exact functions in this connection vary among the firms surveyed but include

the following: (a) Making credit adjustments for the retailers on merchandise ordered; (b) informing retailers about such events as coming promotions and wholesaler policies affecting the retailer; (c) referring retailer requests for assistance that the fieldman cannot handle himself; and otherwise conferring with the sales manager on how individual accounts can be improved.

Assignment of Fieldmen's Territories

The organization of trade territories is another important factor affecting fieldmen activities. Most wholesalers have divided their territory into a number of geographic units which are the basis for fieldmen routes. Establishing fieldmen's territories on a geographic basis makes for efficient use of travel time but when a fieldman must call on all stores within the geographic boundaries of his territory he may encounter stores with special situations that he may be unable to handle.

Some wholesalers take factors other than travel convenience and efficiency into account when assigning territories to fieldmen. For example, among fieldmen there may be some who are experts in meats, produce, or frozen foods. If these fieldmen cover territories similar to those of other field representatives the value of their experience to the overall group of retailers is diminished. Some wholesalers make full use of their specialty men by establishing limited regular territories for them and then permitting them to call on stores in other territories where their expertness may be best used.

Another consideration in organizing fieldmen territories is the kind of stores that fieldmen may call upon. Some wholesalers recognize that a fieldman who may be effective in calling on smaller retailers may not be equally qualified to call upon supermarket accounts. Accordingly, some wholesalers divide their trade territory into a number of geographic units, each covered by one fieldman, but all supermarket accounts may be serviced by one or more special fieldmen covering the entire territory. This procedure has the value to both wholesaler and retailer of tailoring assistance for the few but important larger accounts. It also permits a fieldman to develop an expertness in working with stores of supermarket size and this may be invaluable to the wholesaler in attempting to develop a group of independent supermarkets. Where the wholesaler covers a large trade territory and the large stores associated with him are thinly scattered through the entire area, it may not be feasible to have one or two men service all such accounts because too much of their time would be spent in travel between calls.

Variations in the Fieldman's Role

Among the principal factors affecting the field program are the wholesaler's size, operating radius, extent of product lines, and depth of merchandising program. Other influences are the nature of competition (both chain and independent) and the classes of retailers served (classified by size of store, volume, and type of merchandising operation).

The larger the wholesaler, the more likely that there will be specialists on the fieldman staff. Large wholesalers can afford to train and/or pay for specialized knowledge, and the business volume of many of their associated retailers warrants and requires such specialized assistance. Moreover, the large wholesaler is more likely to supply his accounts with perishables as well as nonperishables, and will need to offer the retailers expert assistance in these lines, too. One of the larger wholesale food distributors uses general store supervisors, supported by specialists, for advice on perishables. This follows the pattern of large supermarket chains and, where the general supervisor is qualified in broad management matters, seems to be a good division of the work among fieldmen. It is possible for a small wholesaler to operate with fieldmen who are not specialists and whose experience may be mostly in nonperishables for several reasons:

- a. Merchandise lines of the wholesaler are more limited and customarily do not include meat and produce.
- b. They deal mostly with smaller stores (whose merchandising needs on in-store promotion and advertising are quite limited.)
- c. Smaller wholesalers affiliated with a national voluntary group can depend on the organization for support in sales promotion, store modernization, and supervisory training--supplementing their own staff and field forces.

There is an important difference in the role of the fieldman when his work is with large retailers rather than with small operations. The large retailers are often excellent merchandisers in several departments and their need is for assistance on store-wide planning at the management level, particularly on store operations. In the small operations, however, many retailers are helped in recruiting and training personnel, in building good displays, in maintaining records, etc. In either case, the fieldman's time has become so valuable that it can only be profitably expended on retailers who have good sales potential and who cooperate actively in the association's program.

While there is a trend--even among small wholesalers--to classify their retail accounts by volume and to suggest that the fieldman allocate his time according to the store's sales potential, the fieldman's time is not being allocated entirely on this basis.

A few small wholesalers seem to set up one principal objective in allocating their fieldman's time; namely, "to bring the poor retailer up to the quality of the best retailers." Accordingly, the fieldman would then probably spend more of his time with small grocers.

The relationship between a fieldman and his retailers is often on a personal basis, so that factors other than wholesaler planning influence the time spent in individual stores. The fieldman is a confidant and consultant for some accounts and to others a visitor to be tolerated but sent on his way as soon as possible. Fieldmen are aware of how they are likely to be received by different retailers and will often tailor their visits accordingly. In practice, this means that fieldmen spend more time in stores where they are welcomed

and may avoid stores where their relationship is poor. Thus, a retailer who can use the wholesaler's help and wants it, but who does not get along with the fieldman in his territory may get little attention from him. It might be helpful if the wholesaler reviewed "problem" accounts with the fieldmen at regular intervals and considered ways of transferring retailers who cannot be handled by one fieldman to the list of accounts serviced by another.

The geographic area covered by fieldmen also shows wide variations. The main factors affecting this are: The wholesaler's operating radius; the number, size, and geographic density of the stores; and the depth of the wholesaler's merchandising program. For wholesalers participating in this study, the average number of stores called upon by fieldmen ranges from 20 to 65 per week, and the average radius of their territories appears to be about 40 miles. There is also a tendency for the larger wholesalers to reduce the number of accounts a fieldman calls on so he may spend more time assisting each retailer in his territory.

The wholesaler's merchandise lines also affect the fieldman's role. Where lines are restricted to dry groceries, the fieldman's task is limited in at least two ways: (a) His concern with merchandising is largely restricted to the dry grocery department; and (b) his role in concentrating retailer purchases with the sponsoring house is reduced. As noted earlier, the small wholesaler tries to offset this limitation by means of special arrangements with suppliers of produce, meat, frozen food, dairy products, and nonfoods. Each of the latter may have fieldmen of his own. In this case, the sponsoring house must attempt to coordinate the activities of all the fieldmen so that their efforts will not overlap or work at cross purposes. Under these circumstances, coordination often means that fieldmen of the wholesalers and those of other suppliers look after their separate areas of responsibility only.

When a wholesaler adds a new major line to his inventory he creates a need for more manpower in the field, with the number of men depending on the extent of the new line and on its inherent merchandising problems. While there is no definite relationship between the number of items carried and the number of fieldmen used, it does appear that specialization of the field function varies directly with the size and variety of the product line. And from the point of view of the retailer, the more complex his operations, the greater the need for specialization of fieldmen. It is the interrelated merchandising of varied food and nonfood items that gives rise to problems that fieldmen are expected to solve.

Another variable affecting the fieldman's role lies in the breadth of the wholesaler's merchandising program. The broader the program is the more exacting will be the fieldman's role--in adjusting it for different types of member stores, and in supervising its applications. Many wholesalers classify their stores by volume, and sometimes by location such as rural or urban, and by competition. A somewhat different program is then set up for each type of store. This serves to "tailor-make" the merchandising plans and also requires greater fieldman adaptability.

The wholesaler's task of classifying his retail outlets for purposes of field work is quite difficult. Following the distributive practice of so

many large manufacturers, wholesalers often classify their outlets by volume into A, B, C stores; several attach distinctive trade names to the several classes of stores they serve. While almost all wholesalers recognize and adjust their field operation for differences between stores, a few wholesalers in the survey reported no relationship between the volume of a store and the kind of help it may need from a fieldman.

With larger wholesalers, merchandising by fieldmen tends to be an integral part of a planned marketing program complete with sales quotas, expense budgets, store modernization schedules, etc. With small wholesalers, on the other hand, aid varies with individual fieldmen and stores. For medium-size wholesalers, fieldmen "cover the waterfront;" nothing in store merchandising is supposed to be beyond their knowledge or ability. Regardless of wholesaler size and merchandising program, the general aim of the wholesaler is to train his fieldman to assume duties and responsibilities somewhat comparable to those of a supervisor in a corporate chain.

THE FIELDMAN'S WORK

The Fieldman's Work Practices

Most of the fieldmen interviewed and observed made some plans covering their entire week's work. Most organized their work week using the program outlined by the wholesaler during the weekly sales meeting. The new material is usually added to the program carried over from preceding week(s) and these make up the agenda for the week's trade calls. In most cases the fieldmen know the stores to be covered and those where they will have to spend extended periods of time. The special material to be covered may influence the fieldman's initial plans to spend more time with some accounts or to omit calls on others.

The fieldman's daily itinerary is closely tied to the weekly work plan. Most fieldmen attempt to cover stores in a sequence which keeps mileage and travel time at a minimum. When a store scheduled for one day's visit cannot be covered, it is usually carried over to another day when it can be conveniently included. Some fieldmen arrange to make their last call of the day at stores where they may need to spend considerable time. Assistance in arranging the daily itinerary is sometimes provided by the sales manager--particularly where a fieldman is new to the job or to the territory.

The extent to which fieldmen plan each store visit varied a great deal among those observed. Some fieldmen do virtually no planning, but call on the retailer, present highlights from the material covered in the weekly sales meeting, exchange a few pleasantries, and leave. Other fieldmen carefully consider the aspects of the sales program they need to cover with the individual retailer and what additional information or advice they need to give him. Some fieldmen maintain a file folder for each account in their territory. In this they place material of special interest to the account, as well as the material being presented to all retailers during the particular week. Other fieldmen use a prepared form, on which they write the objective(s) of the day's visit and long-range objectives for each retailer, in terms of retailer purchases from the wholesaler, or improvements in his operation.

Many fieldmen who were observed in the study did not consciously concern themselves with the manner in which they made their trade calls. However, with the change from salesman to service representative, other fieldmen recognize that their approach to the retailer should reflect the new outlook. They know their accounts well; not only what they should cover during the call but also the manner in which they can be most effective. The new type of fieldman is aware that his effectiveness in working with retailers is, in large part, determined by the way in which he presents himself and his wholesaler's services.

One leading wholesaler observed that a sound fieldman's approach to retailer relations should include the following elements: (1) Fieldman confidence in his own competence to help the retailer operate more efficiently and effectively. (2) A sincere desire to be helpful to the retailer and a willingness to subordinate his personal feelings to help his accounts. (3) A recognition that the store belongs to the retailer, it often represents the operator's life work and he may, therefore, take pride in what he has accomplished with his own efforts. (4) An awareness of some elementary concepts of human motivation so that he is more likely to win the cooperation of his retailers.

Some fieldmen recognize the value of making out a report on each store visited. For them, reporting serves to summarize what they have accomplished and gives them an opportunity to evaluate how close they have come to achieving the objectives they set for the store visit. However, most fieldmen fill in a report form only if required by the sales supervisor. In some instances reports are perfunctory and seem to serve no useful purpose for the fieldmen. When fieldmen are aware that the reports are not reviewed in the wholesaler's office, they sometimes do not take the trouble to make reports on each visit, even though it is "company policy." Because fieldmen are such an important means of communication from the retailer to the wholesaler it seems that regular reporting of store visits by the fieldmen would be invaluable to a sales manager. It also appears that if these reports can be kept simple and made to serve the fieldman as well as his supervisors, their preparation should be an important and regular part of the fieldman's job.

Helping Build a Store Personality

One of the principal tasks of the new fieldman is to help the independent retailer build a distinctive store personality. Several of the wholesalers observed that the independent can remain competitive if he capitalizes on the assets which are peculiarly his. One wholesaler and his fieldman helped a retailer build a \$20,000 weekly volume by helping create a homey style of advertising in which prices were almost never featured.

Helping build a distinctive store personality requires the best efforts of fieldmen and retailer, and in the larger organizations they are aided by the wholesaler's staff of specialists. For example, the advertising department of several of the wholesalers included specialists in layout, media, and production mechanics and these specialists helped develop effective store personalities. In smaller stores the "store personality" may be related principally to such factors as cleanliness and friendly courtesy.

Building Sales at Wholesale and Retail

The task of building sales remains a very important part of the fieldman's job--though the manner in which the fieldman seeks to accomplish this varies among wholesalers. In a few cases the emphasis is on getting retailers to purchase particular promotional items, a wholesaler's private label line, or other items important to the wholesaler. In most cases, however, the emphasis is on gaining retailer cooperation with the broad merchandising program of the wholesaler and with maintaining store operations of a caliber that will increase the retailer's sales (the wholesaler's sales to the retailer will follow, it is assumed).

Many food retailers, familiar with the grocery business, have relatively little knowledge of the meat and produce operations in their stores. Some of these retailers hire an expert meat man and find they cannot exercise effective control over his work because they know so little about it. To help their retailers, some wholesalers have at least one man on their staff who is an expert in retailing of meat. One wholesaler has had one of his fieldmen spend 6 months in training to become an expert in meat. This man visited leading operators throughout the country, studied at various special schools and clinics, and then returned qualified to help affiliated retailers make the most of their meat departments. Another wholesaler who purchases meat for his affiliated retailers has arranged with the meat packer to have three merchandisers assigned exclusively to his affiliated accounts. These men are available for store calls to help retailers develop better meat operations and sometimes work behind the counter when a major promotion is staged by a retailer or when a retailer's meat man is unavailable and a replacement cannot be obtained immediately.

Some wholesalers follow a similar procedure in produce, and, to a lesser extent in dairy, delicatessen, and frozen foods. One wholesaler has an expert in frozen foods who is not only responsible for buying and for taking store orders but who also calls on stores three days a week to give them direct assistance with their frozen food operation. Another wholesaler who handles the distribution of dairy products for a national processor has the services of two dairy men available for his retailers. The suppliers of meats and dairy products in these cases feel that the merchandisers they send to the wholesaler's accounts are a good investment; in helping the retailer they are helping themselves. Many wholesale food distributors are not only adding such merchandisers to their own staffs where feasible but are actively using these men in an effort to strengthen the retailer in his perishables departments.

The use of meat and produce specialists for occasional store visits is helpful, but the fieldmen who make regular weekly calls are the primary source of help to the retailers in the day-to-day operations of these departments. Many of the fieldmen interviewed in the study feel that meats, produce, and other perishables are an important factor in building and holding customers for the independent stores and, therefore, make an effort to see that these departments are merchandised effectively. These fieldmen act as store counselors, checking stocks for adequacy, freshness and variety, and trying to see the overall departments from the viewpoint of the customer. Some fieldmen, aware of their own inadequate knowledge in perishables, have cooperated with their

wholesaler to learn more about these lines. They participate in clinics primarily designed for the wholesaler's larger accounts and they attend industry conventions and other conferences when the subject of merchandising meat and produce is discussed.

Most retailers plan extraordinary promotions for a number of events. These may be in connection with an anniversary, a remodeling, or in some instances the moving to new quarters. Each of these occasions requires more man-hours of work in the preparation and in the handling of increased volume than the retailer and his regular staff can manage. In most cases it is the wholesaler, through his fieldmen, who helps the retailer over these trying periods. It is not unusual for a fieldman to spend many nights and weekends working with the retailer to get a store ready for an opening sale, and the fieldman may also spend several days in the store immediately after opening day to assist in seeing that service and merchandising are maintained at a high level.

Some wholesalers have recognized that assistance of this kind may place a very heavy burden on their fieldmen. While the events occur infrequently for individual retailers, in a territory of 40 to 50 accounts such occasions may average one a month or more. Some of the wholesalers studied have initiated the idea of small task forces which are made available to retailers to help in preparing stores for major sales events. Such task forces consist of two or three well-trained grocery men who can set up a store in a few days. The task force is available to grocers whenever they may be needed and the costs of their salary are borne, in part, by the retailer who requests them for the particular time. A roster of 200 to 300 accounts can keep such a task force well occupied most of the year.

Informing Retailers of Competitive Prices

Pricing is an individual matter for the independent retail grocer. In general, the prices a retailer places on his merchandise will be a function of the prices he pays for the goods, his cost of operation, and the prices of his competitors. Most independent retailers cannot readily obtain information on their competitors' prices. However, all of the wholesalers in the survey filled this gap by providing their retailers with some information about the prices charged by the major retail outlets in the trading area. Wholesaler practices varied in the kind of price information furnished and in the manner in which it was collected. One large midwestern voluntary chain uses a woman to check prices and all price changes noted go out promptly to retailers on a price change form. An eastern wholesaler assigns the pricing function to one fieldman whose territory, for this reason, was limited to only eight stores. This man visits stores of the two leading chains daily; and he tracks down all price changes. At least twice a week a list of the changes is mailed to retailers. In one eastern marketing area, the job of competitive pricing is done by the chief supervisor who visits the leading corporate chain every Friday and checks his order form against the chain's prices, item for item. A fourth wholesaler breaks up the task of obtaining price information among his fieldmen. Each of them is assigned a section of the order form and is responsible for checking prices of the items on it. A complete grocery price check is made once a month, and one on perishables is made once a week. To

supplement price information provided by the wholesaler in weekly bulletins and in the regular order forms, and where no systematic pricing procedure is followed by the wholesaler, some fieldmen interviewed make it a practice to visit leading competitors in the community to check feature items and prices and to convey this information to their customers. Many corporate chains follow a similar practice of checking competitors' prices and of taking them into consideration when setting their own retail prices.

Increasing Efficiency of Store Operations

It is the task and the opportunity of the fieldman, calling on the trade each day, to seek out ways of moving merchandise more efficiently from delivery trucks to storage and onto display stands. Some fieldmen make it a point to inspect store operations on each call and make at least one recommendation for increasing labor productivity in handling merchandise. As a basis for their appraisal of store operations, some fieldmen have sought to learn about work simplification methods and efficient store layout from the wholesaler's store engineer and from published material available to people in the trade. One of the larger wholesale food distributors is considering a training program which would help the fieldmen acquire some knowledge about work simplification. A number have worked with their trade association and USDA in organizing a produce clinic directed at increasing operating efficiency. 1/

Some fieldmen have made a special point of reviewing operating data such as profit and loss statements as a means of helping retailers locate weaknesses in store operations. Most independent retailers know that modern food retailing requires accurate accounting procedures and operating records. And overall profit from store operations is not an adequate index of sound operation. The modern cash register in the store and the modern mechanical accounting systems in the wholesaler's establishment provide the fieldman and his retail accounts with a great deal of vital information about store operations. Wholesalers included in the survey and their fieldmen are increasingly seeking to make operating statistics available to their retailers and to educate them in the use of such data for better control over store operations.

Despite these examples, most retailers and many of the fieldmen covered in the survey were not familiar with operating statistics as tools for store control and improvement. The new kind of fieldman is aware that many retailers will not take advantage of accounting and operating statistics which the wholesaler can make available to them unless they know how to use such material. One wholesaler has compiled and printed representative operating statements indicating expenses for typical independent stores of various sales volume. These statements enable the retailer to find several stores in his own volume class and use them as a yardstick to measure his own operation. The fieldmen regularly review these examples of operating ratios in the affiliated group to

1/ A large number of wholesalers, through their trade associations or directly, have obtained and utilized research reports published by the U. S. Department of Agriculture on increasing efficiency of retail food store operations.

point out strengths and weaknesses in the operating picture of the retailers they call on. Others make use of information available from the retailers' own records, such as the number of customers serviced, the average purchase a customer makes from each department of the store. Working with the stores in this way, the fieldman can show the retailer how to use operating statistics. At the same time he and the retailer locate weaknesses in the store's operation which they can then plan to correct.

Turnover of merchandise is another important phase of store operations that some fieldmen stress. One wholesale food distributor keeps a record of turnover for each grocery item in the warehouse and informs his retailer, through the weekly order book and his fieldmen, of the relative turnover rates of the various items in the warehouse. This focuses attention on the vital element of merchandise movement and helps guide retailers in placing their orders.

Helping retailers become more competent in their operational know-how and management skill is also on the agenda for some of the fieldmen interviewed. Of particular importance in this respect are problems in personnel management. Labor productivity in supermarkets is related to the training and motivation of employees on the job. The new kind of fieldmen help their larger accounts with on-the-job training of employees, often showing new employees how to do particular tasks. They have also counseled retailers on the importance of good employee relations and have given advice on such matters as sources for recruiting part-time help, standards of performance for new employees, and trade union relations.

One retailer visited in the survey who had successfully operated a \$3 thousand a week market, built and opened a store with a potential of \$12 to \$15 thousand a week. However, in the year since his opening, he had been floundering badly because of his inability to direct the work of others and the impossibility of doing all the work himself. He was unable to hold employees for more than a few weeks at a time and absenteeism was high. The fieldman calling on this account undertook the slow process of bringing about an awareness of the supervisory task in supermarkets. The fieldman suggested things the retailer could do to hire and keep better employees. The fieldman helped the retailer with some on-the-job training of new employees and counseled the retailer on what could be and could not be expected of new employees. This kind of assistance proved to be helpful and there was every indication that it might make the difference between an exemplary \$10,000 a week account for the wholesaler or a disillusioning failure.

As a means of helping their fieldmen increase retailer efficiency, some wholesalers have stimulated associated retailers to participate in specialized training programs such as meat cutting, produce handling, and checkout operations. In some instances these programs are initiated by the associations; in others they are cooperatively run with the USDA, State agricultural colleges, or other local institutions. Some wholesalers make it a practice to invite a few leading retailers to attend local, regional, or national clinics and conventions at which they may learn more about efficient store operations and wholesaler-retailer relations. This information helps retailers appreciate the specific recommendations which fieldmen may make to increase store efficiency and thus increases the likelihood that the suggestions will be followed.

Helping Improve Store Facilities

Most of the wholesalers studied have made the services of a store engineer available to retailers. Where the retailer is contemplating a store remodeling or the building of a new market, the store engineer is available for counsel and for developing blueprints to guide construction. For most wholesalers the store engineer continues to function on a "when and if needed" basis and, therefore, the fieldman plays an important part in the retailer's utilization of such aid. Some wholesalers are expanding the scope and usefulness of their store engineering services. One wholesaler has a man on his staff with a background in industrial engineering and the ability to improve work methods as well as working facilities in retail stores. This store engineer goes out to the larger markets, from time to time, to help the operators increase efficiency and improve labor productivity as well as to help retailers plan for more modern stores. Another wholesaler employs a small staff for store engineering work and this group does double duty--servicing both the warehouse and the needs of affiliated retailers. Again, the scope of its concern is to improve not only plant and facilities but working practices as well. In these cases too, the fieldman is the important initiator of action for the retailer.

One of the most important problems faced by the wholesale food distributor in his new relationship with retailers is that of helping the retailer achieve his goal of operating a modern supermarket. This task has several important aspects: (1) Appraising the account's potentiality; (2) helping improve the retailer's success in store management; and (3) helping him finance the physical facilities necessary for supermarket operations.

Fieldmen are often in a better position than the retailer to appraise objectively their account's potentialities and the effects of contemplated changes. They sometimes help the retailer see his potentiality and encourage him to realize it. Fieldmen are in a position to relate experiences of retailers in similar situations and thereby furnish helpful guides to those accounts which are wrestling with the question of whether to expand operations. Moreover, the wholesaler may offer such retailers the services of specialists who will make a detailed analysis of the proposed changes and submit their recommendations.

For most wholesalers it is not feasible to finance the growth of their retailers through merchandise on extended credit, by buying land and building markets, or by outright loans of substantial amounts. One wholesaler firm does facilitate the expansion of associated retailers without direct use of its own funds. When a retailer needs assistance for building a new store or relocating in a new neighborhood, the wholesaler will analyze the potentials of the location, plan the new store to fit the proposed site, prepare financial statements based on the past performance of the retailer, combine all these elements into a brochure to show potential lenders, and finally bring the retailer and likely lender together to discuss terms. Methods of securing substantial increases in capital for business expansion are varied, and specialists in the field of financing may be in a position to assist wholesalers to develop the program which best suits their situation. The counsel that goes along with the offer of financial assistance to retailers is also important and this is the part in which the fieldman can be especially helpful.

Recruiting Fieldmen

Wholesalers find it increasingly difficult to fill the fieldmen jobs with qualified personnel. Because staffing for fieldmen is a problem, the procedures followed by wholesalers are varied and often improvised. Although the labor market from which food wholesalers draw is largely local, and they adapt themselves to their community situation, a number of practices were common to many of the wholesalers studied.

Sources of manpower are quite varied--and recruits are found both inside and outside the company. The large wholesale food distributors are more exacting in the background requirements they set. Some regard previous supermarket experience as a must and, consequently, the corporate chains are now an important source of recruitment. Several of the larger companies have begun to favor graduates from food distribution curricula at the colleges. Another practice of some large wholesalers is to maintain a field reserve with a definite number of men in training, upon whom the company may call to fill vacancies in any of its divisions or to help in the expansion of retail outlets.

In contrast, smaller wholesalers appear to draw many of their fieldmen from the "inside," or from nonspecialized outside sources. As a number of executives put it, they prefer fieldmen who are "accustomed to our way of thinking" (or who may not need retraining) and men whose loyalty to the company has been demonstrated. In one medium-size firm studied, 80 percent of the fieldmen came from the sales force and the remaining 20 percent mainly from chains. Now that the company no longer uses salesmen, it looks to its cash-and-carry section for recruits. In any event, the dependence here is still on internal and not external sources, except for specialists in merchandising perishables who are more apt to come from the outside.

One of the more common recruiting practices among smaller wholesalers is to bring young men into the company and, in the words of one wholesaler executive, "to bring them along, into a fieldman's job." The reason is that in this way the fieldman can be trained in the company's way of doing business. One wholesaler prefers young men with no previous experience; 4 out of 5 of his fieldmen had no previous job. Other small wholesalers use a variety of sources in recruiting fieldmen.

The principal reason behind the difference in recruiting between large and small wholesalers seems to be the competition for corporate chain personnel. In today's labor market, good personnel demand substantial present earnings and prospects for further growth; on both scores the larger wholesaler may be able to offer more than the small operator.

Screening and Selecting Fieldmen

Other differences in the selection and appraisal of applicants appear to be related to the wholesaler's size. In the small organization the procedures were informal. The wholesaler-owner or a small group of executives screened

and selected the applicants. Among their considerations were these: Honesty, loyalty, personal appearance, knowledge of the grocery business, ability to handle people, and the ability to follow through. So important is the follow-through in field work that some wholesale food distributors make probationary appointments, and give fieldmen about six months to prove their ability. Other small wholesalers go beyond these personal characteristics and consider such questions as: Is the applicant qualified to operate a \$30,000 per week retail operation? Is he well-rounded in all aspects of retail operation--grocery, meat, produce, accounting, etc.?

Selection procedures by the very large wholesalers studied are systematic and more demanding. In one company, for example, the personnel manager has set up job specifications, forms, tests, etc. When an applicant passes these he is subject to a screening process by the heads of personnel and training who inquire about the applicant's general qualifications, his knowledge of the grocery business, his grasp of operating controls, and his living habits. Then, when approved by the personnel director, the applicant has his final interview with the sales director, who makes the final decision.

Training Fieldmen

Just as the more exacting role of a fieldman requires more careful selection and screening of applicants, so training of those coming into the job has been given more attention by the wholesalers surveyed. Again, there is a difference between the efforts of large and small wholesalers and between formal and informal training programs. Smaller companies tend to rely on their national voluntary group for much of their training programs. The larger wholesale food distributor, even where he is affiliated with such a group, usually develops his own program.

Small and medium sized wholesalers use several training methods for their fieldmen. Among the principal methods were: (1) Formal lecture or clinic sessions under the auspices of the particular national voluntary group. These sessions are often held several times a year, and last for 2 or 3 days each. Beyond these courses, there generally is no formal training for new or old fieldmen. The closest approaches to formality are the so-called guided discussions at weekly meetings of fieldmen which some of the wholesalers hold. (2) Another practice is to put the trainee to work for 8 to 10 weeks in a large supermarket affiliated with the wholesaler where he may learn good retail practices. One company sends its new men to train with a larger voluntary chain in another area for similar reasons. (3) Several small and medium-size companies used on-the-job training; the new fieldmen would first travel with the chief supervisor and later in the company of one of the better fieldmen. As a rule, the newer fieldman is given the less important stores for his first independent calls. (4) Every wholesaler studied supplied both old and new fieldmen with copies of leading trade publications and, in a number of instances, tested their reading of the publications. Medium size wholesalers who can carry the expense also take their fieldmen to trade conventions from time to time.

More elaborate training programs are found among some of the very large wholesalers. One has set up as the goal of its training program: "To train

every fieldman to the point where he can set up a complete supermarket, department by department." In one organization, the sales service manager is the key figure in field training. He sometimes accompanies inexperienced fieldmen on their first store calls. At present this company is developing a 13-week orientation program for new fieldmen that will consist of: (1) Outside field training; and (2) "inside" training which familiarizes the beginner with internal procedures and the services available to him. The 13-week period will be divided as follows: Four weeks with the sales service representative. Two weeks with the produce representative. Two weeks with the meat representative. Four weeks in the office (including 2 weeks with perishables, 1 week in the warehouse, and 1 week divided between the grocery and advertising departments).

A similar training schedule is used by another large wholesale food distributor. The trainee reports at the company's main office and his first week of training is spent with the training director. In the second week he is turned over to the operating division and the sales manager of the division takes over on-the-job training. Each week, the sales manager sends a detailed progress report with appraisals and a report written by the trainee to the training director. Then, following a predetermined schedule, the trainee is moved from department to department. At the end of this field training, he is returned to the company's home office. He spends from 3 days to 1 week at company headquarters putting all his papers together, after which he may be sent to any one of the divisions and assigned a territory by the division manager. After 5 or 6 more weeks, the training director spends 1 week on the road with the trainee. Subsequently, any follow-up by the training department is made at the specific request of the division manager.

Responsibility for training varies among the wholesale food distributors studied. Among the different officers who head up fieldman training are sales managers, advertising and promotion managers, chief supervisors or superintendents, personnel managers, and training directors. In each case the responsible officials emphasized the importance of training and development of fieldmen. There was also substantial agreement on the kind of training needed. First, fieldmen should be well grounded in operations of the produce and meat departments. One company executive noted that the big training problem is in perishables--particularly meat. More and more, he said, the stress in training in his firm is being placed on meat, on the theory that it is easier for a meat man to learn groceries than for a grocery man to learn meat merchandising. The special training schools operated by the company emphasize the meat and produce operations.

Secondly, fieldmen should know more about store management generally. They should be better acquainted with retail accounting practices and methods of analyzing store operating statistics; fieldmen should know something about principles of work simplification. Some wholesalers also commented that fieldmen should be aware that supermarket managers work through people and, therefore, the fieldmen ought to know something about human relations processes. (These wholesalers added that the latter topic would give fieldmen insights into their own working relationship with retailers as well as help them instruct the retailers on effective employee relations.)

Compensation for Fieldmen

A problem in personnel management for fieldmen is the amount of compensation that should be given. Wholesalers are competing directly with other distributive organizations for manpower and, although the role of the fieldman is exacting, his performance is difficult to evaluate.

Numerous differences in methods of payment were found among the wholesalers studied--including straight commission, straight salary, and salary plus incentive. Only 2 wholesalers, the 2 smallest of those surveyed, used straight commission. In one case, it was 1 percent of the fieldman's sales; and in the other three-fourths of 1 percent of the total volume of business done with the stores in his territory.

A number of small and medium-size companies use a system of salary plus incentive--the latter representing payment for exceeding the sales quota for their group of stores. In most companies using this method, the quota is carefully computed; but in others, the "standard" seems to be based on a rule-of-thumb. In still another departure, the monetary incentive varies in direct proportion to the company's share of total purchases by member stores. The higher the ratio, the higher the fieldman's bonus. Where this scheme is used, fieldmen do not qualify for the bonus if the stores' purchases from the warehouse are less than 25 percent of their total sales. This, consequently, also serves as a major check on the fieldman's performance.

The wholesalers studied showed wide variances in their compensation for fieldmen--from \$75 a week to \$180 a week. Even within the framework of any one system of compensation, there are usually variations by type of field coverage. Thus, the grocery supervisor and/or grocery specialists usually receive somewhat more than meat specialists, who in turn are paid a little more than produce men. Most of the large wholesalers seem to adhere to a straight salary method of compensation--supplemented by a nominal expense account plus use of a company automobile. Several wholesalers, however, do not provide any such additional payments. As in most mixed compensation systems it is almost impossible to calculate the net effect of expense allowances on total compensation or the influence of the "incentive" part of the earnings on fieldman performance.

In addition to regular incentives, some wholesalers try to motivate their fieldmen by means of payments for special achievements. Bonuses, for example, are often provided for the following:

1. Quality of field performance--e.g. for achievement in display contests, for prompt handling of special merchandise orders, for securing retail participation in special drives.
2. Enrollment of new member stores in the voluntary chain. Here, the amount of the bonus may vary in accordance with the size and type of store signed up.
3. A certain number of store remodelings in their territory.

4. Increased sales by member stores.
5. Contributions to the company's profit.

Promotion and Separation of Fieldmen

What is ahead for successful fieldmen among grocery wholesalers? Judging from the experience of leading wholesalers, promotion from among the ranks of fieldmen is quite common. For example:

1. Of fieldmen hired by one large wholesaler before 1950, and still with the company, only one remains on the road. All others have risen to executive positions.
2. The executive vice-president of another company is a former fieldman and so are two of the firm's branch managers.
3. Some of the best positions in middle management at another large company--division managers, store planning managers, perishables managers--are now staffed by former fieldmen.

This is not to suggest, however, that all wholesalers are in a position to advance their fieldmen so rapidly. First, there must be plenty of "head room" if there are to be promotions from among the fieldmen, and the small size of some companies limits such promotional opportunities. Second, many field programs are so recent, dating back no more than 3 or 4 years, that there has been little opportunity for individual fieldman growth. Third, promotion from the ranks is naturally slow in areas where population growth is relatively static and where food and grocery sales do not support rapid expansion of the wholesaler.

The rapid development of wholesalers with affiliated retail groups, and the short supply of qualified fieldmen have made separations from the force another personnel problem for wholesalers. In some instances, the problem has been how to deal with old and once valuable employees who cannot be fitted into the new pattern of field operation. For other wholesale food distributors the problem is one of holding on to fieldmen after an investment has been made in their training and development. Because the relationship between the fieldman and his accounts may be close and personal, the loss of a fieldman may mean a deterioration in retailer relations as well as the added cost of recruiting and training a replacement. While several of the wholesalers surveyed commented on this problem, no special procedure was reported for dealing with separations--those initiated by the company or by the fieldman. It appears that such problems are handled on an individual basis.

DIRECTION OF FIELDMEN

Directing fieldmen so they can attain optimum effectiveness includes such factors as: (1) The development and use of communications systems between wholesaler management and the fieldman, and between the retailers, the fieldmen,

and wholesaler management. (2) Helping the fieldmen plan their daily itinerary and their weekly or monthly objectives in terms of the wholesaler's weekly merchandising programs and his long-run objectives. (3) The supervision of fieldmen, including the day-to-day supervision necessary to get a job done and supervision during the development of fieldmen. (4) Control and evaluation of fieldman's performance. This includes the setting of guides and standards, reviewing performance on the basis of such standards and keeping the fieldmen informed on how well they are doing, and some system of rewarding better-than-average performance.

Communicating With Fieldmen and Retailers

The methods used for communicating with fieldmen vary among the wholesalers surveyed according to their size, structure of organization, and size of trade territory. Nevertheless, all wholesalers studied favored a weekly sales meeting as the best method for keeping fieldmen informed about the regular merchandising program and about any changes in company policies or programs, or about external conditions affecting their work. Personal contact, whether formal meeting or informal get-together in field or office, is usually the only means of communicating in the small company, but in the larger organizations, it is only one of several methods used. This difference may be regarded as a direct result of the lengthened chain of command. Given specialized wholesaler management, branch offices or other company divisions, and widely-dispersed retail outlets, supplementary methods become necessary.

In one company, all important communications on policies and organization flow from headquarters to branch managers to fieldmen. Another large company has adopted two approaches to the problem of communicating with fieldmen: (1) Sales meetings, attended by the sales manager as well as the top management group; and (2) work outlines, which serve to guide fieldmen in their contact with stores. Written supplements to oral communications are essential for larger wholesalers to assure that adequate and comparable information is available at different levels and at different geographic points in the organization. In large organizations, more people need to be kept informed about company policies than in small firms; the communication system cannot be limited to direct and personal contacts.

For information on external conditions such as the supermarket business as a whole, wholesalers keep fieldmen supplied with the latest in trade periodicals. The national trade associations and voluntary organizations are also important sources of information for fieldmen and many of the firms studied send some of their fieldmen to meetings sponsored by the national organization.

Leading wholesalers in facilitating communication from fieldmen to management are following certain trends:

1. A swing away from detailed written forms to simple, concrete report forms. Where written reports are used, they often adhere to the "principle of exceptions"--i.e. they require fieldmen to note abnormal, unusual events, needs, problems, etc. (see appendix for examples of report forms).

2. Widespread use of sales analysis of member stores' records (mainly profit and loss statements and balance sheets) which may reflect the particular fieldman's performance. Among the principal data sought are gross profit, concentration of store purchases (with the wholesaler), and expense to sales ratios. Even some rather small companies were found to use data processing machines for this purpose.
3. Where contact between management and fieldmen is still close and informal, as it generally is in the smaller companies, sales managers seek out the information on their own from retailers as well as from fieldmen. There is usually then, no regular reporting period for fieldmen.

All wholesalers in the survey accepted their new retailer-oriented role in food distribution, and recognized the importance of good communication in winning the retailers' active cooperation in the program. They realize it is important to keep retailers informed about the field program and its objectives in order to facilitate the fieldman's work and to improve coordination of the wholesaler-retailer activities.

For this purpose, the companies studied had developed a number of channels of communication between retailers and wholesaler management. The most direct of these is the retailer advisory committee--which is designed to give retailers a voice in the management of the field program. The effectiveness of such advisory committees is hard to appraise; some wholesalers are enthusiastic about their use, while others have restricted them to special occasions. Other wholesalers have periodic retailer meetings, at which field plans are explained and/or decisions ratified. Again, wholesalers studied differed in their views on the value of regular retailer meetings. Wholesalers had better experience with such meetings when they were not held frequently and where the session covered information helpful in store operations. Wholesalers studied reported that retailer meetings were less well attended and less successful when they were held frequently and when decisions on the wholesaler's week-to-week merchandising program was to be reached.

Despite different opinions on the value of meetings as a means of communication to retailers, most wholesalers studied felt that the work of fieldmen and cooperation of retailers in the voluntary program would be facilitated to the extent grocers see the program as their own. For this reason most wholesalers continued to explore means by which they could obtain increased retailer identification with the program.

One wholesale food distributor had organized associated retailers into several adjoining area advertising groups. Each week the different groups meet at one retailer's home in the respective areas. The fieldmen for the areas also attend the meetings. Jointly they discuss the program presented by the wholesaler, and decide upon the layout of the weekly advertisement, its contents, and the specials in the produce and meat departments. Observations reveal an extraordinarily high rate of cooperation with the joint merchandising program. This can be attributed to the fact that these retailers have participated closely in planning the program, and identify themselves with it.

Personal store visits by company executives on a regular or occasional basis is practiced by all wholesalers studied. This gives the executives an opportunity to keep in touch with the stores and to convey their personal point of view to the retailer. Finally, house organs and/or merchandising bulletins were used by almost all of the wholesalers surveyed to supplement the direct, face-to-face communications. In some instances, there seemed to be an over-emphasis on the use of printed bulletins.

Planning the Fieldman's Work Week

Most wholesalers in the study developed a weekly merchandising program to be promoted by the fieldmen in their store visits. The contents of these programs vary from week to week and supplement the continuing activities of fieldmen. The practice of selecting a group of items each week for fieldmen to promote is useful in stimulating their interest and in giving them a fresh approach to their weekly trade calls. The week's program for fieldmen may also include specialty items such as housewares, seasonal specialties, and new lines, which they are to promote over a period of several weeks.

Although each wholesaler uses somewhat different techniques for presenting the weekly action program to his fieldmen, most rely heavily on weekly meetings timed to suit the merchandising week. The sales manager acts as chairman and the sessions are usually referred to as sales meetings. Buyers and other company officials are called upon to present particular phases of the program. Where items are to be featured by the retailer, the merchandise as well as newspaper advertisements, handbills, window banners, etc. are shown and discussed. While fieldmen are free to ask questions and make comments, the function of the meetings is primarily to communicate information to them which they will need in making trade calls. Fieldmen of most of the wholesalers studied do not usually participate in deciding what should be included in the weekly merchandising program they will convey to the retailers.

Some wholesalers make up weekly bulletins which describe the items suggested for featuring by the retailer for the week. Some of these bulletins are the product of extensive work by the wholesaler and include illustrations and colored pages; some also include general market information as well as a brief story to help in merchandising each item listed. Wholesalers often use these bulletins as part of their weekly meetings though others expect the fieldmen to read the bulletins when they can. In any event, fieldmen are expected to be well informed about the bulletin since copies are mailed to all retailers and they may raise questions about them.

Supervision of Fieldmen

The new role of fieldmen in the wholesale grocery organization has also required a new look at supervision of fieldmen. When fieldmen acted as salesmen and were primarily concerned with selling and taking orders from retailers, their earnings were largely based on sales and supervision was a relatively simple (and often sporadic) matter. It was often assumed that the men would "supervise" themselves to maximize their income and that what was good for them,

as salesmen, was also good for the wholesalers. Today, good fieldman performance is more complex and precise measures of fieldman effectiveness are difficult. Supervision of fieldmen can no longer be haphazard. Supervisors among leading wholesalers surveyed are aware of their responsibility to lead and inspire the fieldmen, to confer with them regularly, and to use all the means of communication available to supervision (through field reports and warehouse data analyses) to keep in close touch with field operations. Of course, differences were found between the large voluntaries and the small. Among the largest firms supervisors of fieldmen conduct themselves as sales managers; among the smaller wholesalers informality and close personal relations take the place of planned fieldman contacts.

In addition to direct supervision by the responsible officials of the wholesale food distributor, fieldmen are guided by the informal exchanges among the group of fieldmen on the wholesaler's staff. Working relationships between fieldmen are not shown on an organization chart but their importance to the general tone and morale of the field operation can hardly be over-emphasized. In practice the men often work closely together in the field. Thus, in addition to the many informal exchanges of ideas at meetings, fieldmen often team up for big store remodeling jobs and sometimes work together on in-store promotions.

Several sales managers commented that supervision includes activities designed to help fieldmen develop greater competence as well as to get the day's work done. Several others observed that supervision was a continuing task of guiding fieldmen, appraising their performance, taking steps to improve performance, and analyzing results. Thus, supervision was viewed as a continuous process of training and developing the men to their fullest potential. Sales managers who had this outlook usually cited various ways in which they sought to guide their men and to help them develop greater competence; among the methods often mentioned were those described elsewhere in this report under fieldmen training and communication.

Control and Evaluation of Fieldmen's Performance

The job description is the starting point of an effective system for the control and evaluation of fieldmen's performance. Although all wholesalers included in the survey had worked out a listing of fieldmen's functions, only the largest of them had detailed specifications of what these tasks were and what was required for their effective performance. (See appendix for one such job description.) Both large and small wholesalers recognized the importance of defining the fieldman's task more precisely and of keeping job descriptions current in an industry where basic relationships between suppliers and customers have been changing so rapidly.

Under the old system, where the principal function of a salesman was direct selling, evaluating performance was relatively simple. Good sales meant good performance and most wholesalers established commissions in such a way that earnings were tied to this measure of performance. Under the new pattern of wholesaler-retailer relations, direct selling is subordinated to other fieldmen activities and, therefore, the basis for evaluating performance is more

complex. Nevertheless, wholesale food distributors need to evaluate the performance of their fieldmen if they are to effectively control and direct their activities.

Wholesalers use a number of different criteria in their efforts to measure performance of the new type of fieldmen. Some wholesale food distributors studied continue to use sales in the fieldman's territories. Among these wholesalers, some pay special attention to the fieldman's sales of the more profitable lines or toward the special items they feature from time to time. These wholesalers feel that a fieldman's ability to obtain retailer purchases of these items is a good measure of his overall performance. Other wholesalers studied rely upon reports from the retailers themselves concerning the assistance they have received from the fieldmen. Although every wholesaler could cite testimonials from their retailers about assistance from fieldmen, they are aware that retailer comment can hardly be considered adequate for a continuing appraisal of fieldmen's performance. Some small wholesalers depend on the sales manager's knowledge of all accounts to recognize improved purchases from a retailer which are attributable to the fieldman's efforts. Other small wholesalers do not set up any specific measures but rely upon an overall impression gained from many sources as to the effectiveness of a fieldman's performance.

One sales manager observed that if evaluations of performance are to be effective, the standards for such evaluation need to be known among fieldmen as well as company officials. When the fieldman knows the standards by which his performance is being evaluated he has guides for his activities. On the other hand, when the fieldman is uncertain of how he is rated, there is a danger that he may guide his activities by standards he alone thinks important. Among the fieldmen interviewed in the survey few, except in the larger firms, were sure of the standards used for rating their performance. All had some general ideas--frequently in terms of sales in their territory--but few were sure. In most cases they also indicated a desire to know the standards so they could direct their efforts toward obtaining a better performance record. More wholesalers need to give careful consideration to what they want to use and what they are using in evaluating their fieldmen's performance. ^{2/} At the same time they need to convey their conclusions to the fieldmen if their standards are to guide the fieldmen's activities.

ADAPTING THE STUDY SUGGESTIONS TO INDIVIDUAL WHOLESALER NEEDS

The task of improving the effectiveness of fieldmen is complex and encompasses virtually every phase of wholesale operations. One way in which wholesaler management might begin this task is by examining and seeking to improve the way in which its fieldmen are directed. This represents an area of activity almost wholly within the capabilities of management and one which is likely to have almost immediate results on fieldmen effectiveness. Moreover, as the study disclosed, there is room for considerable improvement in the supervision of fieldmen, especially among the middle-sized food distributors.

^{2/} The problem of setting standards goes back to the task of carefully defining wholesaler objectives and fieldmen's functions to help realize the company's goals.

In order to develop the steps that wholesalers would need to follow in applying the suggestions made in this report, a middle-size wholesale grocer in Pennsylvania was selected for special study. The firm had been following fieldmen practices similar to those noted for other middle-size food wholesalers and was considered by industry people to be effective in its retailer relations. An intensive preliminary study of the wholesaler's fieldmen operation was conducted and observations were made at management, fieldmen, and retailer levels.

Steps Taken to Improve the Wholesaler's Field Operation

The new wholesaler-retailer relationships detailed on preceding pages of this report suggest that efforts to improve the direction of fieldmen would include: (1) A clarification of fieldmen's duties by the wholesaler; (2) more systematic supervision of the fieldmen, including more concrete criteria and procedures for evaluating performance; and (3) a clarification of what the wholesaler expects from the retailer in conforming to the organization's merchandising program. Action on these three points was taken by the representative wholesaler studied. His action did not cover all phases of wholesaler-retailer relations nor were all the suggestions made in the survey adopted. Instead, only those ideas that suited this wholesaler's own needs and which were likely to contribute directly to a more effective field operation for him were introduced.

Clarifying the Fieldman's Duties

Top management of the wholesaler studied recognized that its field operation had not kept pace with the development of its voluntary group of retailers. As a first step in improving field activities, the wholesaler took stock of its retailer relations and the trend of their business and set its company objectives accordingly. Having done this, they were in a position to clarify the responsibilities of their fieldmen.

Clarifying fieldmen's duties involved a management decision as to just what these duties are and guiding the fieldman by telling him what those duties are, why they need to be done, and how to do the job. After informal discussions with the fieldmen and retailers the following restatement of fieldmen duties was made:

1. To build better retailers by:
 - a. Offering retailers constructive criticism and advice.
 - b. Constantly working to assist each retailer in his merchandising program.
 - c. Checking store conditions and reporting them to the retailer and the sales manager.
 - d. Encouraging and facilitating cooperation between the retailers and the wholesaler's staff of specialists.

2. To perform the following routine tasks--(these were not changed during the period of the study):
 - a. Make collections and adjustments.
 - b. Show retailers items that the wholesaler wants featured.
3. Refer all requests for assistance that fieldmen cannot handle to the sales manager.
4. Complete a store visit report for each stop made.

A conference was held for the purpose of introducing the changes to the fieldmen. The fieldmen were informed of the restatement of their duties. In addition, the fieldmen were briefed on the latest trends in wholesaler-retailer relationships to clarify why the emphasis in their duties was being changed. Finally, a statement of how to do their job was presented to the fieldmen. Because of differences in retailer personality and ability, as well as store volume, equipment, and location, the statement of "how to do your job" was general in nature. The following statement was prepared for the fieldmen:

How To Do Your Job

Because the fieldman's job is so complex, it is virtually impossible to set up a concise, step-by-step program of how to do your work. However, it is possible to list certain procedures, which will help you to be more effective.

1. Know what you should do

Analyze your job. Think of your job in terms of the job description that was worked out with your help and that has been presented to you. These are the things that we all agree will build more effective wholesaler-retailer cooperation.

2. Routine tasks

- a. Plan your work so that routine tasks take less time. Routine tasks are the things you need to do in most every store you visit. Plan your work so that these tasks can be accomplished quickly, leaving more time for the creative and constructive part of your job.
- b. Know what you are going to say and do before you get there. Plan your work before you enter the store. Advance preparation will enable you to know what you are going to say and do in each store, thereby saving both you and the retailer time.

3. Creative tasks

- a. Have a short run and a long run objective in each store. After servicing a store for a period of time you will have become

familiar with the retailer, his method of operation, and his problems. Decide on the objective you want to achieve on each visit and on the objective for a 3-month period. Working toward these objectives will help you organize your efforts, and accomplish more than if you try to do whatever comes to mind after you're in the store.

- b. Develop an advisory relationship. A careful selection of your objectives and a sincere desire to help the retailer help himself will make the adoption of your suggestions more likely than if you try to tell the retailer what to do.

Systematic Supervision of Fieldmen

Some improved practices were also introduced in the supervision of fieldmen. As indicated by the survey, one of management's most important supervisory functions is to communicate information to the fieldmen. Weekly sales meetings are a good way to accomplish this. The wholesaler studied held a weekly sales meeting to inform the fieldmen of the merchandising program for the coming week. Each item in the merchandising program was reviewed with the fieldmen; information about the product and the performance expected of the retailers were both covered. In addition to the discussion of "specials" for the week, new items were also noted. The meeting also provided opportunity to discuss institutional copy, texts of radio and TV advertisements, and any other information the wholesaler wished to convey to the fieldmen. This meeting was regularly attended by executives, buyers, the sales manager, the advertising manager, the fieldman and, sometimes, department heads. The meetings were an effective way of informing the fieldmen about management's program for the week and no change was made in their conduct.

Each fieldman had previously been required to turn in a "Daily Sales Report" which gave management the following data for each retailer called on:

1. Whether an order was placed.
2. Whether a check was given (checks were given to fieldmen for the previous week's order(s)).
3. Whether a note payment was made (in connection with fixtures purchased, or other items for which the wholesaler held the notes).
4. The number of cases of the following items ordered: candy, cigarettes, health and beauty aids, specialty items, lamps, frozen foods, and any other items that might be designated.
5. Starting and ending mileage.
6. Any special remarks - these were written in the "remarks" section. (In practice, fieldmen did not use this portion of the report frequently.)

This report form had been useful to the wholesaler in the early stages of the organization of his voluntary group. However, the wholesaler had progressed so far in the operation of his voluntary group that the form was of little or no value. The form emphasized selling certain items to the retailer as contrasted to the wholesaler's stated policy of helping the retailer sell to the consumer. Moreover, it had required the fieldman to spend valuable in-store time completing a form that duplicated information which could be more readily and more accurately obtained from automatic accounting equipment and other sources. It failed as an instrument of control because it gave no guidance to the fieldman in effectively carrying out his duties, and did not provide management with data upon which to determine how well the fieldman was carrying out his duties. In order to correct these shortcomings, a new fieldman report was developed. The new report form provided fieldmen with a guide to the things management thought important in the store contacts and provided management with information about what the fieldmen did during each store visit.

STORE VISIT REPORT

Date _____

Retailer's Name _____

Location _____

Store Conditions:

Good Fair Poor

| | | | |
|--------------------|-------|-------|-------|
| Cleanliness: | _____ | _____ | _____ |
| Stock: Groceries | _____ | _____ | _____ |
| Stock: Perishables | _____ | _____ | _____ |
| Store Exterior: | _____ | _____ | _____ |
| Cooperation: | _____ | _____ | _____ |

Assistance given retailer during this call: _____

Remarks: _____

Signature: _____

The report form was designed to meet the needs of a specific wholesaler and as part of a program to improve fieldman effectiveness through better methods of directing his activities. It may not be generally applicable, nor is it necessarily superior to report forms currently being used by other wholesalers. The report form was designed to meet the following specifications:

1. Be simple to use.
2. Enable management to know just what the fieldman does during each store visit.
3. Serve as a guide for the fieldman to effectively do his job (by indicating the kinds of things management is concerned with).
4. Serve as a channel of communication between the store and management.
5. Produce additional data to assist management in evaluating fieldman job performance.

As indicated in the survey, evaluating fieldman performance is part of systematic supervision; it involves setting up effective controls and establishing criteria upon which to evaluate fieldman performance. Following discussions with fieldmen and the retailers, these criteria were established for evaluating fieldmen performance and the fieldmen were notified about them:

1. The extent of retailer cooperation with the voluntary merchandising program and overall sales results obtained.
2. The number of store remodelings and store expansions in the route.
3. The amount and quality of constructive assistance rendered to retailers as reflected in the stores covered.
4. The fieldman's attitude toward his job as reflected by his initiative and cooperation with wholesaler management, and overall sales results obtained.

The instructions given to fieldmen for completing the new report form also stressed the importance of the above points and provided management with some information on how well fieldmen were doing their job. The fieldmen were advised that the amount of their bonus would be determined in large part on the basis of the above criteria.

Clarifying Retailer Cooperation With the Voluntary Program

Improved practices were also introduced in communicating to retailers and fieldmen what constituted effective cooperation with the wholesaler's merchandising program. Retailer cooperation with his grocery wholesaler may take many forms, such as having the order ready when the fieldman arrives (where orders are not mailed in), assisting the truck driver to unload the merchandise from the truck, accepting the order on a case count basis rather than

checking each item, and disposing of dented merchandise at reduced prices rather than returning it. However, these are all secondary to retailer cooperation with the wholesaler's merchandising program. Action to clarify and facilitate retailer cooperation with the merchandising program was taken as part of the wholesaler's effort to improve his field function.

In the grocery wholesaler studied, the merchandising program included two classes of weekly specials, "banner items" and "feature items." The banner items were the main specials, and were generally reduced in price. The feature items were secondary specials and were generally at the book or regular price. The wholesaler supplied the retailer with a set of window posters for the banner items. The wholesaler usually included some 50 to 60 banner and feature items in his weekly bulletin, which was issued separately from the order book. Also included in the bulletin were new items, the items the fieldmen would carry in his grip, institutional copy, tips on produce, and other information the wholesaler wished to convey to the retailer. The bulletin was illustrated, and colorful; it supplemented the regular order book and was designed to stimulate favorable retailer response. The wholesaler had enjoyed a high degree of retailer patronage, based on the proportion who bought the weekly banner and feature items and those who handled them in accordance with the merchandising program.

In order to help the fieldman gain further cooperation with the merchandising program, the following new steps were taken by the wholesaler:

1. The dates the specials were to be in the stores were clearly marked on the cover of the bulletin. This was done to overcome any retailer confusion arising from the fact that previously the bulletin carried the date of issue, which differed from the effective date for the banner and feature items.
2. The retailer was furnished a set of display cards for each of the banner items. These cards could be used either on an end, wing, or dump display, or at the regular shelf position. The cards were to remind the retailer of the advertised prices and also gave him attractive cards to use with the merchandise.
3. Each retailer was furnished with a facsimile of the newspaper advertisement, where applicable, showing the banner and feature items for the week. This enabled him and his employees to be more fully aware of the program, and of the individual items included. It also reminded the retailer that he was paying for the merchandising program, and in his own self interest he should support it.

Results After the Changes Were Introduced

After the changes were introduced there was a greater degree of cooperation with the merchandising program and more systematic assistance to retailers by the fieldmen. At the same time, average weekly purchases from the wholesaler for the group of stores included in the study rose by 5.5 percent; however, what proportion of this increase should be attributed to the improved retailer relations could not be determined.

Increased Cooperation With the Merchandising Program

In order to achieve the maximum effectiveness of the voluntary group's advertising, retailers were expected to stock the items jointly promoted, to use the advertised price for the items, and to feature them in some special way in the store. In both stocking and adherence to the merchandising program, improvements were noted after the wholesaler had taken steps to improve his field operation. For example, a check of banner and feature items showed that the number of such items stocked had been increased by 2 and 4 percentage points respectively. Similarly, in the period afterward, a larger percentage of banner items and of feature items was merchandised in accordance with the voluntary program.

More Systematic Fieldman Assistance to Retailers

The wholesaler's fieldmen recognized that a part of their new responsibility was to assist retailers with advice on how to improve their merchandising and store operations. The preliminary analysis of field operations had revealed, however, that the fieldman had so many details connected with orders, collections, and adjustments that often the call was concluded without tangible assistance to the retailer. Moreover, neither the report form that was originally used nor the informal reporting to the sales manager made it necessary for the fieldmen to consistently try to render this kind of assistance to the retailer. The new report form reflected management's continuing concern with retailer assistance, as against routine detail connected with order taking, and thus served notice on the fieldman that this was a primary objective of each store visit. Analysis of the new report forms filled by fieldmen over a period of 3 months indicated a more consistent policy of assistance being given and more follow-up on suggested changes if they were not immediately adopted by the retailer. Previously, no record had been kept of the number of cases in which fieldmen had rendered specific assistance to their retailers or had encouraged and initiated improvements in the store facilities. After the new practices had been introduced, however, a material increase in the number of such cases was reported by the fieldmen.

APPENDIX

Sample Job Description for Fieldmen

Job Description Fieldman

Reports to: Sales Manager

Function: To foster cooperative relations between the affiliated retailers in his territory and the company and to assist the member stores to merchandise effectively and operate efficiently. To accomplish these objectives the fieldman will perform the following duties:

I. Relations with Retailers

1. Develop good working relations with retailers and foster their loyalty and confidence in the company.
2. Assist retailers in the development of improved merchandising methods so as to improve volume, profits, and store appearance.
3. Offer constructive criticism to retailers in order to initiate more efficient store operation and to assist them in developing sound store operating practices.
4. Assist retailers in locating competent help and in training store personnel.
5. Assist members in analyzing operating statements so that corrective action may be taken.
6. Assist retailers in methods of setting up displays and allocating space in the store.
7. Urge retailers to utilize services offered by the company.

II. Implementing Merchandising Program

1. Insure that retailers receive display materials to support merchandising program.
2. Check retail prices to see if retailers are maintaining advertised prices.
3. Inform retailers of special promotions.

III. Assist Sales Manager by:

1. Reporting prospective new members.
2. Locating potential new store locations.
3. Reporting the need for store engineering services.

IV. Keeping Sales Manager Informed of Local Conditions and Problems

1. Report competitors' activities on locations, promotions, and pricing.
2. Report stores needing specialized assistance.
3. Visit competitive stores to learn new techniques that can be applied in affiliated stores.
4. Prepare reports required by company or requested by the sales manager.

V. Working Relationships With Other Departments of the Company

1. Work with both produce and meat supervisors to improve store operations in these departments as directed by the sales manager.
2. Assist the store engineer in providing adequate services to the affiliated stores.

Remarks: _____

C. Check your member file which will include:

1. Review of consultation report on previous call.
2. Current check sheets.
3. Dealer's suggestions and any correspondence you this store.

Remarks: _____

D. Discuss Concentration of Purchases and Meat Dept with over-all Meat Program.

Remarks: _____

7. Sales-Service Man's Suggestions and Recommendations

8. Dealer Comment on Department Survey and Interview

Date of this call: _____

Arrival time: _____

Departure time: _____ Sale

(Original sales Dept. - Copy to Merch)

MEAT DEPARTMENT

SALES-SERVICE MAN'S CONSULTATION REPORT

STORE _____

Date _____

TOWN _____

1. General appearance of Meat Dept. Display Area.
Remarks: _____

2. General appearance of Meat Dept. Processing Area.
Remarks: _____

3. Rotation of product in display and coolers.
Remarks: _____

4. Check competition for prices, quality, merchandising, etc.
Remarks: _____

5. Appearance and attitude of personnel.
Remarks: _____

6. Discuss following subjects with dealer:

A. Check last Profit and Loss Statement.

1. Percentage of labor cost to sales or sales per man hour: if these figures are kept.
2. Gross profit in department.
3. Distribution Rate.
4. Comparison with previous period and same period years ago, noting percentage of gain or loss.
5. Supplies, laundry, etc.

Supervisor _____

Date _____

M. T. W. T. F. S.
AM PM

STORE _____

Conditions

Action

Meat

Grocery

Produce

Dairy

Frozen

Health & Beauty

Prices

Displays

General

SPECIAL CHECK

Remarks: _____

Figure 2.--Examples of fieldman report forms.

10. Dealer's comments on above survey:

Discuss following subjects with dealer:

- A. Check last Profit and Loss Statement.
 - 1. Percentage of labor cost to sales or sales per man-hour.
 - 2. Gross Profit by departments.
 - 3. Operating cost and net profit.
 - 4. Comparison with previous period and same period year ago, noting percentage of gain or loss.

Remarks: _____

B. Check advertising and promotions....Store sign and
Remarks: _____

C. Check your dealer file which will include:
Remarks: _____

- 1. Review of consultation report on previous
- 2. Current check sheets.
- 3. Dealer's suggestions and any correspondence this store.

Remarks: _____

D. Discuss Concentration of Purchases and d
Remarks: _____

STORE SALES-SERVICE MAN'S CONSULTATION REPORT
STORE _____ Date _____
TOWN _____

1. General appearance of outside of store.
Remarks: _____

2. General appearance inside of store.
Remarks: _____

3. Produce Department.
Remarks: _____

4. Meat Department.
Remarks: _____

SALES SUPERVISOR'S REPORT

Store Name or Code No. _____ Date: _____
Manager's Name _____ (City) _____
Store Address: _____ (Street) _____

| | |
|------------------------------------|--------------------------|
| SUPERVISOR'S TOTAL GRADE OF STORE: | |
| EXCELLENT | <input type="checkbox"/> |
| GOOD | <input type="checkbox"/> |
| FAIR | <input type="checkbox"/> |
| POOR | <input type="checkbox"/> |
| UNSATISFACTORY | <input type="checkbox"/> |

Last Week \$ _____ Year Ago, Same Week \$ _____
Year To-date Compared to Last Year: UP _____ % DOWN _____ % EVEN _____

PHYSICAL CONDITION

EXTERIOR

- 1. Foreign Signs _____
- 2. Windows Clean _____
- 3. Posters Up _____
- 4. Side Walk and Parking Lot Clean _____

INTERIOR

- 5. Foreign Signs _____
- 6. Floors Clean _____
- 7. Price Tickets in Use _____
- 8. Signs and Price Tickets Clean _____

On Nos. 1 and 5 indicate number of signs if any On all others, "X" = Yes "O" = No.

MERCHANDISING

- 1. Is week's featured or advertised items displayed _____
- 2. Is advertising and display material in use _____
- 3. List X Y Z items on display _____
- 4. List non-X Y Z items on display _____

PRODUCE DEPT.: (Check with "X" for yes, "O" for no).
1. Full Assortment _____ 2. Fresh Looking _____
5. Stale merchandise on rack (LIST) _____

- 3. Color Contrast _____
- 4. Is every item priced _____

MEAT DEPT.: (Check with "X" for yes, "O" for no)
1. Are cases clean? _____
2. Is case fully displayed? _____
3. Does meat look fresh? _____
6. Are any R & W items displayed on case? (LIST) _____
If not - what brands are? _____

- 4. Are all items priced? _____
- 5. Displayed for point of sale? _____

PERSONNEL:

U.S. DEPARTMENT OF AGRICULTURE

NEG. 4417-57 (8) AGRICULTURAL MARKETING SERVICE

Figure 4.--Examples of fieldman report forms.

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W 1544 (19)



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