

28 Essential Steps for Field Sales Agents Before the 2023 Festive Season.



Introduction

The second quarter of 2023 in India has emerged as a beacon of hope for the FMCG industry, signaling a remarkable resurgence. According to the latest data from NIQ's Q2 2023 FMCG Snapshot, the industry has witnessed an impressive value growth of 12.2%.

This growth not only surpasses the previous quarter by 2% but also outpaces the same period in the preceding year by 1.3%.

The primary drivers behind this surge have been higher consumption and a noticeable reduction in price increases, thanks to a softer inflationary climate.

However, it is the forthcoming festive season that promises to mirror the buoyancy seen in the food categories, setting the stage for an even more remarkable quarter ahead.



As field sales agents in the FMCG industry, this data represents a golden opportunity. It's a reminder that now is the perfect time to strategize and plan for the upcoming festive season. Whether you're sketching out an idea or gearing up for a big marketing campaign with a substantial budget, meticulous planning and execution will be your key to success.

The festive season is an all-hands-on-deck moment for FMCG companies. The competition is fierce, and every interaction with customers holds paramount importance. Having worked with a diverse range of brands, both large and small, we've gathered invaluable insights that can make a world of difference in your campaign strategy.

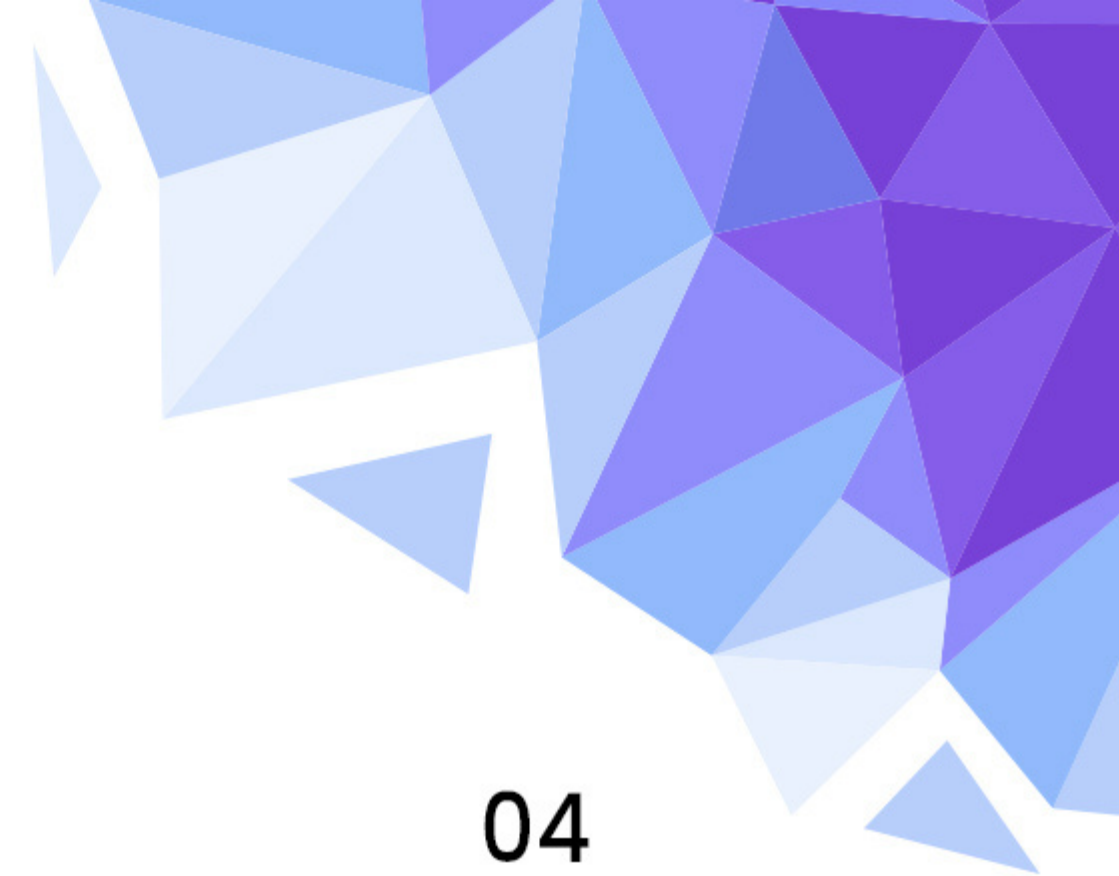
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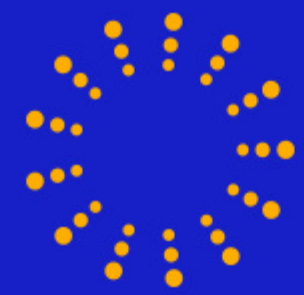
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Capitalizing on the Surge in Demand

Sales of consumer electronics and FMCG saw an extraordinary surge of 25–30% YoY during the Independence Day sales of 2023. This demand is not exclusive to a particular category; rather, it extends to a variety of FMCG products, sweets, electronics, and luxury items, particularly during the festival season.

However, with great opportunity comes great responsibility and challenges.





Challenges Field Sales Agents Face During the Festive Season

1. Intense Competition:

The FMCG industry in India is an arena where numerous brands and products fiercely vie for shelf space and consumer attention. Field sales agents find themselves under immense pressure to achieve sales targets in a saturated market. This pressure can lead to increased stress and a constant need to stay ahead of competitors, **making the festive season a high-stakes game.**

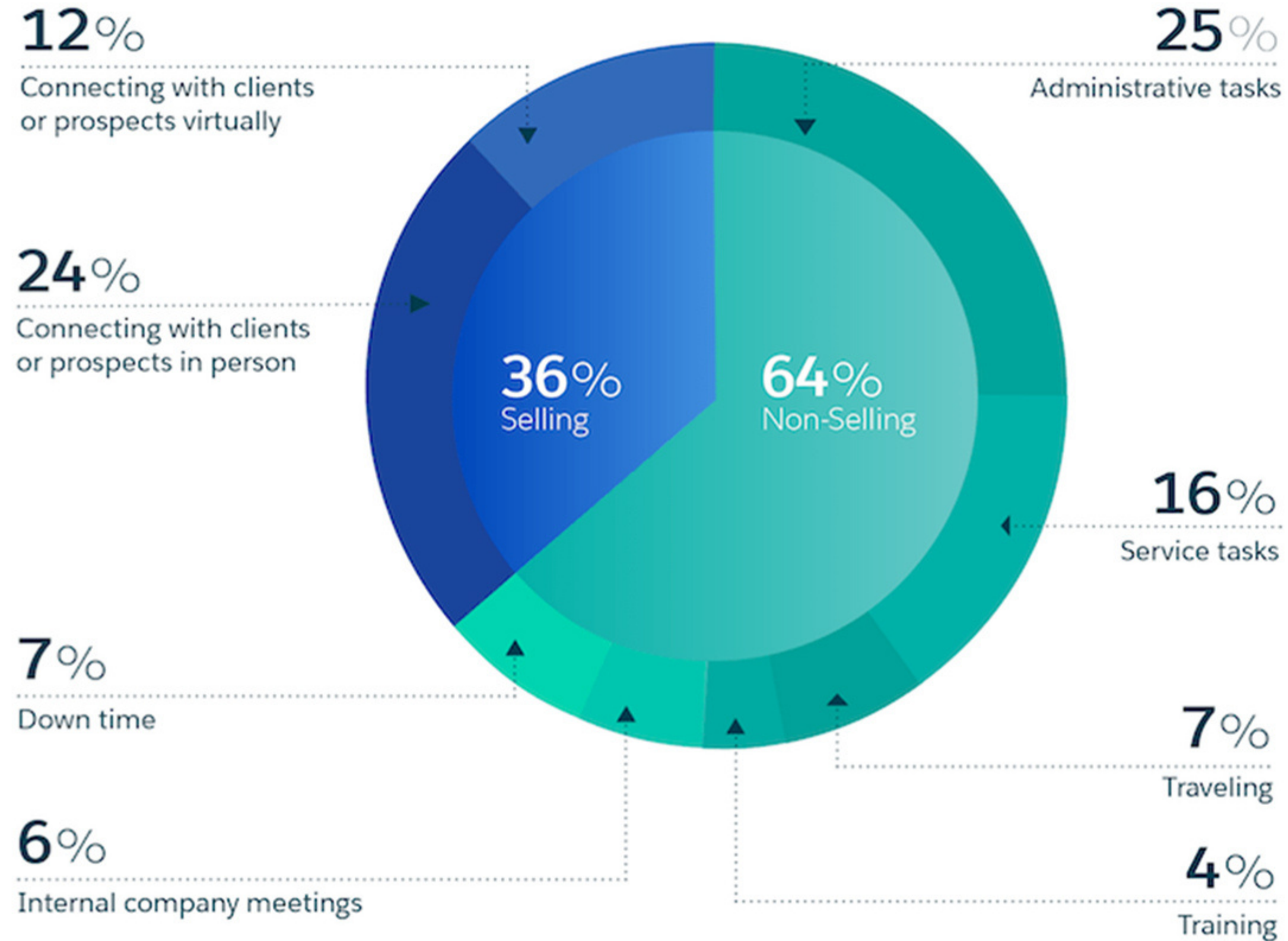
2. Retailer Relationships:

Building and maintaining strong relationships with retailers is paramount in the FMCG industry. Sales agents need to negotiate for prime shelf space, promotional displays, and favorable pricing terms. However, amidst intense competition and evolving retailer preferences, securing and sustaining these relationships can be a formidable task.

3. Merchandising and Shelf Space:

FMCG products rely heavily on prominent shelf placements and eye-catching merchandising to grab consumers' attention. Securing optimal shelf space in retail stores is often a challenge, especially for newer or smaller brands. Sales agents may need to employ creative strategies to ensure their products stand out and shine during the festive season.





Average time spent on tasks by sales reps. Image courtesy [Spotio](#)

4. Seasonal Demand and Inventory Management:

FMCG products experience seasonal demand fluctuations, particularly during the festive season. Sales agents must accurately forecast demand, manage inventory levels, and ensure timely product deliveries to meet consumer expectations without excess costs of stockouts. Balancing the books during such volatile times is easier said than done.

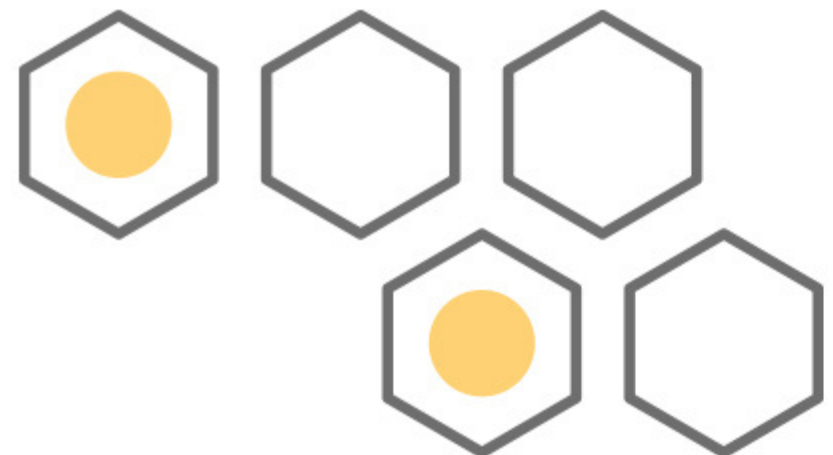
5. Pressure to Meet Sales Targets:

The constant pressure to meet sales targets is a defining characteristic of the FMCG industry. Sales agents often face aggressive sales goals and tight deadlines, which can lead to increased stress and the need to consistently perform at a high level. This pressure can sometimes take a toll on work-life balance and overall job satisfaction.

The festive season in India promises great potential for the FMCG

industry, with soaring consumer demand and burgeoning online sales. Field sales agents must be prepared to tackle the challenges that come with this heightened demand, including fierce competition, the imperative to maintain strong retailer relationships, and the need for creative merchandising and inventory management.

In this environment, it's essential for field sales agents to not only meet their sales targets but to excel. By carefully planning, strategizing, and implementing the lessons learned from both the data and the challenges we've discussed, you can harness the full potential of this festive season, making it a period of immense growth and success for your FMCG brand.





Tick these **28 Actionable Steps** Ahead of **2023 Festive** **Season in India**



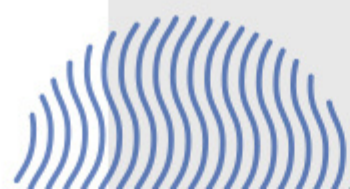
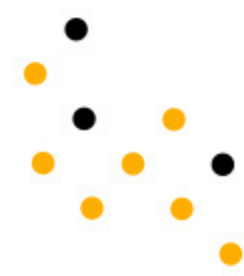
1st Check

Take note of last 3 years festive season sales data to plan solid

The festive season in India is a time of immense opportunity for FMCG companies. However, to capitalize on this surge in demand, field sales agents must be armed with the power of historical data. Take a look at your step-by-step guide to make the most of this festive season



- ✓ Gather Historical Data Of Last 3 Years
- ✓ Deploy Field Sales Automation Tool
- ✓ Analyze Historical Sales Trends
- ✓ Optimize Sales Strategy
- ✓ Take Geographical And Retailer Category Insights
- ✓ Forecast Present Years Demand
- ✓ Plan Comprehensive Demand Plan For All The Categories
- ✓ Monitor And Keep Track On The Implementation





1. Gather Historical Data:

- ✓ Begin by compiling historical sales data from the previous festive seasons. This data forms the foundation of your demand planning.
- ✓ Collect information on factors like product sales per month during festive periods, product performance during different festivals, regional variations, and assortment strategies that worked well for specific outlet categories.

2. Use Sales Force Automation Tools:

- ✓ Implement cutting-edge tools like Sales Force Automation (SFA) and Field Sales Management Tool. These tools capture crucial data, including sales per month, product performance, and regional variations.
- ✓ Explore retailer apps, modern trade apps, and promoter apps that can provide real-time insights into customer behavior and preferences.

3. Analyze Historical Sales Trends:

Examine historical data to identify patterns and trends. Focus on aspects such as:

- ✓ Monthly sales during previous festive seasons.
- ✓ Which products have traditionally performed well during specific festivals.
- ✓ Regional variations in sales performance during the same festival.
- ✓ Effective assortment strategies for different outlet categories.

4. Optimize Sales Strategies:

- ✓ Take inspiration from successful case studies like the chocolate and choco-pie brand that increased order quantity by 8.5% in July to prepare for the upcoming festive season.
- ✓ Consider adjusting your field sales team's schedules to maximize retailing hours during October and November.
- ✓ Focus on 'must-sell' SKUs during the festive season to ensure visibility and demand.





5. Geographical and Retailer Category Insights:

- ✓ Leverage tools like BreezeFSM to gain granular information for optimizing your campaign at a geographical or retailer category level.
- ✓ Recognize that each festival has unique regional importance. Tailor your strategies accordingly. For instance, focus on Ganesh Chaturthi and Onam in western and south India, Holi in the north, and Chatt Pooja and Durga Pooja in the east.

6. Demand Forecasting:

- ✓ Embrace data analytics to forecast demand accurately. Utilize historical consumption patterns, current trends, and insights from previous festive seasons.
- ✓ Identify potential spikes in demand and be prepared to stock specific items accordingly.
- ✓ Collaborate with retailers and supply chain managers to seize new market opportunities and scale up logistics infrastructure.

7. Develop a Comprehensive Demand Plan:

- ✓ Initiate your demand planning process well in advance. Start by evaluating last year's sales data and current supply levels.
- ✓ Take into account any changes or unique circumstances for the current year, such as early holiday promotions or improved visibility.
- ✓ Craft a demand plan that sets realistic sales goals and becomes the basis for inventory management and promotional strategies.

8. Continuously Monitor and Adapt:

- ✓ The festive season is dynamic, and customer preferences can change rapidly. Continuously monitor data and customer behavior to adapt your strategies in real-time.
- ✓ Be ready to make agile decisions and adjust your product offerings, sales strategies, and promotions based on the ongoing demand trends.



- ✓ Automate Inventory Management
- ✓ Efficient Warehouse Management
- ✓ Inventory Classification
- ✓ Avoid Stockouts for Success
- ✓ Efficiency Through Automation
- ✓ Product Diversification
- ✓ Regular Stock Takes
- ✓ Collaboration with Suppliers
- ✓ Automated Reordering
- ✓ Customer Feedback
- ✓ Continuous Monitoring

2nd Check

Monitor Inventory Level to Avoid Stockouts

Nothing can be more detrimental to a retailer during the festive season than running out of popular products, which can lead to lost sales, customer dissatisfaction, and a tarnished reputation. Let's explore the importance of tracking inventory levels during the festive season and provide field sales agents with a step-by-step checklist to navigate this crucial aspect of retail operations and avoid stockouts.

1. Automate Inventory Management:

- ✓ Leverage automation tools, such as BreezeFSM, to make inventory transparent and eliminate the possibility of last-minute stockouts.
- ✓ Implement advanced data analytics to identify buying patterns among consumers and benefit from special festive season schemes run by brands.
- ✓ Tools like BreezeFSM can help identify issues or red flags in your inventory and prompt preemptive actions to prevent stockouts.

2. Efficient Warehouse Management:

- ✓ Anticipate additional storage requirements for restocking products during the festive months. Calculate the extra space needed.
- ✓ Employ AI-driven location trackers to create 3D maps of your warehouses, optimizing product storage and preventing both stockouts and surplus inventory.





3. Inventory Classification:

- ✓ Use data analytics to determine optimal inventory levels. Classify inventory materials based on priority or popularity to ensure that essential items are always in stock.
- ✓ Continuously monitor demand trends and make adjustments to your inventory classification as needed.

4. Avoid Stockouts for Success:

- ✓ Consider the cost of deadstock – inventory that isn't selling – and the need to clear space in your warehouse.
- ✓ Prioritize product availability to provide a positive shopping experience for your customers.

5. Efficiency Through Automation:

- ✔ Implement automated inventory processes to save time and money. Use real-time data to make informed decisions about ordering, stocking, and shipping inventory.
- ✔ Streamline supply chain processes for on-time deliveries and optimal quantities.

6. Product Diversification:

- ✔ Diversify your product offerings to provide customers with alternatives. Use customer feedback and market trends to identify new products to add to your inventory.

7. Regular Stock Takes:

- ✔ Perform regular stock takes to ensure inventory accuracy and reduce the risk of stockouts. Identify discrepancies and adjust inventory levels accordingly.

8. Collaboration with Suppliers:

- ✔ Collaborate closely with suppliers to establish regular delivery schedules, provide advance notice of changes in demand, and develop contingency plans for unexpected events.





9. Automated Reordering:

- ✓ Implement automated reordering systems that trigger new orders when inventory levels fall below a certain threshold. This ensures you always have the products you need.

10. Customer Feedback:

- ✓ Listen to customer feedback through surveys, social media, and in-store interactions to understand product demand. Use this insight to stock the right products at the right time.

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3rd Check

Optimize your routes for best last min delivery

Optimizing route planning during the festive period is crucial for ensuring timely deliveries, boosting sales, and meeting customer expectations. Your field sales agent can follow this step-by-step guide to navigate route planning efficiently during the festive season:

- ✓ Leverage technology
- ✓ Optimize Outlet Coverage
- ✓ Efficient Route Planning
- ✓ Timely Fulfillment of Orders
- ✓ Streamline Order Collection
- ✓ Improve Product Assortment
- ✓ Embrace Location Intelligence
- ✓ Real-Time Monitoring
- ✓ Customer Communication





1. Leverage technology:

- ✓ Leverage route optimization tools like BreezeFSM, to gain insights into outlet performance. Identify outlets that require more attention or revival for expected sales.
- ✓ Run special schemes and promotions to retain active outlets and convert dormant outlets into active ones, increasing traction.

2. Optimize Outlet Coverage:

- ✓ Analyze outlet data to ensure comprehensive coverage. Prioritize outlets with higher potential sales during the festive season.
- ✓ Identify trends and product preferences specific to different regions and festivals, tailoring your approach accordingly.

3. Efficient Route Planning:

- ✓ Devise efficient routes that consider the geographical distribution of your outlets. Group nearby outlets to minimize travel time and fuel consumption.
- ✓ Anticipate high-traffic areas during the festive rush and plan alternate routes to avoid delays.

4. Timely Fulfillment of Orders:

- ✓ Recognize the importance of timely order fulfillment. During peak shopping weeks, punctuality is paramount.
- ✓ Ensure drivers are equipped with the necessary tools and information to meet multiple delivery deadlines without delays.

5. Streamline Order Collection:

- ✓ Leverage Distributor Management System (DMS) to collate all direct orders and field sales automation orders into a single, efficient system.

This streamlined approach expedites order processing and ensures faster flow of orders to the company.





6. Improve Product Assortment:

- ✓ Employ tools to enhance product assortment. Utilize 'Must Sell' and 'Fast Selling' features to drive product assortment and boost drop size.
- ✓ Adapt your product offerings to match customer demands and preferences specific to the festive season.

7. Embrace Location Intelligence:

- ✓ Leverage location intelligence for effective route management. Understand traffic patterns, identify the best last-mile delivery routes, and discover hidden location points.
- ✓ Anticipate demand intensity in various locations and deploy staff to the nearest delivery centers, ensuring timely deliveries in high-demand regions.

8. Real-Time Monitoring:

- ✓ Continuously monitor your routes and delivery progress in real time. Use technology to stay updated on the status of each delivery and make necessary adjustments on the fly.
- ✓ Address any delays or unexpected issues promptly to maintain the efficiency of your route planning.

9. Customer Communication:

- ✓ Keep customers informed about the status of their orders. Proactive communication about expected delivery times can enhance the customer experience.
- ✓ Provide customers with options for tracking their deliveries, adding an extra layer of convenience.





Conclusion

For field sales agents, this data represents not just an opportunity but a calling to action. It's a reminder that meticulous planning and execution will be your keys to success in the highly competitive landscape of the FMCG industry during this festive period. This insights and checklist serve as a guide to navigate this season effectively and deliver exceptional value to your brand and customers.

The challenges that lie ahead, from intense competition to the critical need for strong retailer relationships, creative merchandising, and effective inventory management, are not to be underestimated. However, they also present opportunities to excel and stand out in the crowd.

01

Sales agents must embrace **historical data** as a valuable tool, using it to make informed decisions and predictions for the festive season. The step-by-step guide presented here covers key aspects of gathering and analyzing historical data, implementing automation tools, optimizing sales strategies, forecasting demand, and continually monitoring and adapting to dynamic customer preferences.

02

Furthermore, the importance of tracking **inventory levels** to avoid stockouts cannot be overstated. A stockout during the festive season can be detrimental, leading to lost sales and customer dissatisfaction. The checklist underscores the need for automated inventory management, efficient warehouse practices, and a focus on product assortment and diversification.

03

Lastly, the significance of **route planning** during this season cannot be ignored. Timely and efficient deliveries are essential, and technology can be your ally in optimizing routes, covering outlets effectively, and ensuring timely fulfillment of orders.



As we prepare for the festive season, remember that challenges often bring out the best in us. By adhering to these checklists and guidelines, field sales agents in the FMCG industry can navigate the forthcoming festive season with confidence, ensuring that it becomes a period of immense growth, success, and satisfaction for both your brand and your customers. The opportunity is ripe, and the path forward is clear. It's time to embrace the festive season with determination and a commitment to excellence.

BreezeFSM helps you manage your field sales in real time and provide you with tools to expand your reach and increase your revenue. To know more about our products, reach out to our experts today!

Field Sales Agent Checklist – Season Sales Special

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