

Getting Started in Field Sales

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The term 'field sales' might sound like an unusual concept in today's digital world. The evolution of technology means countless sales processes now happen remotely, with reps sitting behind computer screens, typing messages to prospects, or calling leads.

However, there are still many industries where outside sales remain crucial to a company's success. In a complex sales environment, such as the B2B or enterprise space, a field sales strategy can help organizations strengthen connections with consumers, through face-to-face interactions.

If you're the kind of professional who loves interacting with people and travelling to new locations, a field sales role could be perfect for you. Here's everything you need to know about the responsibilities of field sales reps, and how you can thrive in this career.

What is Field Sales? Is Field Sales Right for Me?

Otherwise known as 'outside sales', field sales is a type of sales strategy that involves connecting with customers outside of a conventional office environment. Unlike 'inside sales' professionals, who spend the majority of their day emailing and [calling customers](#), field reps connect with customers and commit to building relationships face-to-face.

The roles of field service representatives can be highly varied. You might spend a lot of time travelling to different countries, hosting demonstrations, or presenting products to buyers. Like most sales roles, success as a field rep will depend heavily on your ability to connect with other people.

If you're wondering, 'is field sales right for me'? ask yourself what your ideal role would look like. Are you confident travelling to different places? Are you excellent at communicating and building relationships with other human beings?

Keep in mind, most employers look for more experienced sales professionals to fill outside sales roles. That's because these professionals rarely have full sales teams behind them. You'll need to be well-versed in sales strategy, and confident working independently.

How to Get Started in Field Sales: Skills you Need

Becoming a field sales rep can be a little more complicated than getting a standard sales job. Since you're working independently, you may need to demonstrate more skills, and more knowledge of the standard sales process than other beginners.

With this in mind, it's worth investing some time in developing specific sales skills you might need to use on the job, such as prospecting, lead validation and [social selling skills](#). Taking training courses and gaining experience in entry-level sales roles can help to boost your chances of success.

It's also worth investing in:

- **Your soft skills:** Field sales representatives need a number of crucial soft skills. You'll need to be able to communicate effectively to share the benefits of different products and services with customers. You'll need resilience to overcome objections and handle rejections. Field reps also need to have excellent time management and organization skills to ensure they're using their days as efficiently as possible.
- **Your sales knowledge:** Field sales reps often need a high level of business and sales acumen. You'll need a clear knowledge of the products and services you're selling and what pain points or goals they can address. You'll also need to know how to use different sales methodologies and strategies to boost your chances of success. Taking training courses or joining forums online will help you to improve your hard skills.
- **Social skills:** While all sales professionals need good social skills, it's particularly important to have a high level of emotional intelligence as a field service rep. Experts in field sales manage relationships with customers on an intimate basis. You'll need to know how to listen actively to customers, empathize with their needs, and validate their concerns.

Mastering Field Sales: Steps for Success

Like most sales roles, field sales is something most professionals master with time. The more time you spend within your role, the more you'll learn about how to connect with customers, optimize the sales process, and convert sales leads. However, there are some steps you can follow from day one to improve your chances of success in this area:

Step 1: Always have a plan

Going into a sales process blind is never a good idea, particularly when you're interacting with someone face-to-face. As a field sales professional, you should always have a plan for how you're going to approach your prospect, build a relationship and close a deal.

Make sure you know how you're going to pitch your product or service to customers effectively, by researching their pain points and goals in advance. Think about how you're going to follow up to maintain the lead's attention and increase your chances of earning the sale.

Step 2: Set ambitious goals for success

Setting goals can be a powerful tool in the sales world. Most of the time, your employer will set goals for you in terms of a specific quota you need to reach. However, by evaluating your own sale performances and outcomes you can also set goals for yourself. For instance, you could challenge yourself to reach out to a

certain number of prospects every week.

You could set a target for how many meetings you want to have by the end of the month, or how many buyers you want to retain by the end of a specific period. These goals will keep you motivated and focused as you work independently.

Step 3: Make the most of your time

Allocating your time wisely is important in any sales position. However, in a field sales role, when you're going to be regularly travelling to different places, it's particularly important to have a good schedule. Plan each day in advance, with a focus on optimizing every moment.

If you're travelling to meet a client on a train, you can use that time to do research into their company, and their potential goals. Or you can use the time to perfect your sales presentation. If you're travelling home from a meeting, you can use that time to make notes, or reach out to new prospects.

Step 4: Focus on long term relationships

One of the reasons field sales professionals are so valuable in many industries is they're more effective at building long-term relationships with customers. Face-to-face interactions can create an affinity that leads to better long-term loyalty and results. However, building a relationship with a prospect doesn't just have to rely on in-person interactions.

Establish an effective communication cadence, and schedule follow-up activities to match. Think about how you can keep in touch with prospects by calling them or reaching out over social media between meetings. Remember, your connection with your customer shouldn't end after you close the deal. Following up and ensuring your lead is happy with their purchase can increase their lifetime value, and their chances of making additional purchases.

Step 5: Strategically Manage Customer Priority

Depending on your job description, you might be responsible for handling various different clients as a field sales representative. Part of mastering field sales is figuring out which customers you should be giving the majority of your attention. Building long-term relationships with customers takes time and focus. You need to actively listen to each customer and understand their needs.

However, you won't always have enough hours in the day to give everyone the same level of attention. Knowing how to identify your most valuable leads will ensure you're focusing on the right opportunities. You can then automate following up with other prospects that need more work.

Step 6: Use Technology to your Advantage

Speaking of automation, there are various ways that technology can help you to build relationships and close deals in today's world. You can use calendar apps to automatically arrange meetings with potential

prospects based on shared availability and time zones. There are apps available that can help you to track your own sales metrics, improve your productivity, and manage your time.

You can even use analytical tools to examine opportunities in different sales landscapes, validate leads, and more. If you're ready to invest in the world of AI, you can even use generative tools to help you craft intuitive [follow-up emails](#) and messages.

Step 7: Adopt a Growth Mindset

Finally, as a field sales professional, you'll need to be committed to constant growth and development. The world of sales and your target audience will continue to change at a rapid pace in the years ahead. Committing to a strategy of lifelong learning will help you to consistently hone your skills and become more effective in your sales job.

Make a habit of regularly reading books on sales techniques, attend conferences to hear from industry experts, or join forums like the Hard Skill Exchange. Complete certifications and listen to podcasts and webinars to expand your education.

Diving into Field Sales

Even in today's digital world, there's still a clear demand for field sales experts who know how to build relationships with prospects in person. If you can connect to other people on a human level, and you're committed to constantly expanding your skills, you could thrive in a field sales role.

Start developing the skills you need for field sales success at the [Hard Skill Exchange](#) today.??

HSE Team