FTS FIELD AID

Account Visit Checklist

Objective: The purpose of this Field Training Specialist (FTS) Field Aid is to provide comprehensive guidance and resources to make each FTS as efficient and effective as possible when representing Valvoline for our installers. This handbook aims to:

1. Equip FTS with the necessary tools and information to support and enhance the business objectives of our customers.
2. Streamline the training process, ensuring consistent and high-quality transfer of knowledge around Valvoline's products and services.
3. Facilitate efficient planning and execution of field visits to maximize productivity and impact.
4. Standardize procedures for pre-visit preparation, in-field activities, and post-visit follow-up to ensure clarity and effectiveness.
5. Empower FTS to handle customer objections and challenges confidently and professionally.
6. Promote a unified and professional representation of Valvoline, fostering strong relationships with our installers and enhancing overall customer satisfaction.

Part 1: Pre-Visit

Salesforce Account Review:

- Check the account hierarchy, call history, and contacts.
- Look under the parent account in the related tab for specific customer goals.
- Ensure you understand the business objectives that the customer aims to achieve.
- Identify active promotions for the customer in Salesforce under the related tab in enrollment locations.

Performance Analytics:

- Use VIA or SAC tools to identify successes and opportunities in line with business goals.
- Note relevant data on sales, services sold, premium percentages, and other key metrics.

Questions to Answer:

- What are the performance metrics across the company?
- What is the number of specific services/products sold per day across the company?

Define Training Objectives:

- Clearly define training objectives for each meeting and location visit focusing on business goals.

Action Items:

- Focus on 2-3 training objectives.

Optimize Visit Routes:

- Use Salesforce Maps to optimize visit routes for all locations.

Part 2: District Manager (DM) Meeting

Create Pre-Cap for DM:

- Craft personalized pre-visit communications addressed to the District Manager (and/or other appropriate audience(s)), emphasizing training goals and requesting a meeting.

Plan for the DM Meeting:

- Schedule a meeting with the DM (and/or other appropriate audience(s)) to discuss strategies and address potential objections.
- Possible topics to cover during the meeting:
  - Introduction and welcome.
  - Overview of the visit purpose and goals.
  - Training session plans.
  - Current market snapshot using data analytics.
  - Proposed strategies for improvement.

Part 3: Objection Handling

Prepare for Objections:

- Anticipate potential objections and prepare persuasive responses.

Part 4: Location Visit

Conduct Training Sessions:

- Provide targeted training based on VIA/SAC, SF findings, and DM meeting insights.
- Topics to Cover:
  - Sales strategies and best practices.
  - Product knowledge and promotion execution and techniques.

Part 5: Post-Visit

Data Entry:

- Update Salesforce with information gathered during the visit. (Best practice is to do this immediately after a location visit, before leaving the parking lot)

Follow-Up Communications:

- Send recap email summarizing key points and offering ongoing support.

Review and Learn:

- Hold a post-visit debriefing with the account manager to discuss training effectiveness and areas for improvement.
- Discuss and order any POS or equipment needed.

Use this checklist to ensure a structured and comprehensive approach to account visits, maximizing the effectiveness of each interaction.