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# Introduction

The 'Users Guide to Field Marketing' has been written and developed as a reference resource for all who operate within the sales and marketing sector and as a response to the results of research commissioned by the DMA Field Marketing Council.

This guide has been produced by the DMA Field Marketing Council (FMC) to highlight the flexibility of field marketing as an important discipline and service to the sales and marketing industry.

The main services offered by field marketing companies are:

- sales;
- merchandising;
- auditing;
- sampling;
- demonstrations/roadshows/exhibitions;
- mystery shopping.

Newer emerging services, which include telesales, handling, despatch and warehousing are also joining the field marketing mix.

Research was commissioned by the FMC in order to assess levels of trade awareness and understanding of field marketing and the service capability of the industry across clients and agencies. The following are some key perceptions from a mix of agencies and clients:

- there is a lack of understanding of field marketing, with letter-box marketing incorrectly being seen as a service provided;
- auditing, a vital part of monitoring brand distribution and development is not credited as a field marketing discipline at all;
- a very high percentage of both clients and agencies did not attribute either sampling or merchandising to field marketing;
- 50% of agencies questioned believe they would not use field marketing since it would not be relevant to the services they provide, though some respondents seemed unaware of competitors using field marketing;

- 30% of all agencies said that they did not know enough about the field marketing resource to use it effectively;
- clients seem to be less aware than agencies of the range of activities that FM can provide.

The results of the research clearly demonstrate that opportunities for innovative and creative marketing solutions using field marketing, are being overlooked by some clients and agencies due to misconceptions about the industry.

The members of the FMC feel that this needs to be addressed, and that they should clearly outline the services offered by field marketing companies. This Users Guide therefore is intended to explain and define field marketing and present examples of its effective use in marketing solutions.

The guide covers all of the above disciplines and we hope you will find it useful.

## What is field marketing?

- sales;
- merchandising;
- auditing;
- sampling and demonstration;
- mystery shopping;
- roadshows and exhibitions.

Field marketing is the function of out-sourcing sales and promotional activities, which are conducted by professionals and audited strictly in terms of results.

This requirement can be either for short projects to meet a temporary need, or on an on-going basis where the client has a permanent requirement. Field marketing can be used for a variety of different types of work in order to meet the client's aims and objectives.

Field marketing can be conducted in the retail or business to business environment, or direct to the consumer, either through the market place or home. The geographical coverage can be specific local areas or national or international.

With the client's strategies and objectives firmly in mind, the out-sourced staff are selected for their relevant skills. The field marketing company will then train and manage the staff, providing all the infrastructure required to perform such a task. The field marketing company will maintain a close eye on the client's objectives and steer the activity so that these are met during the exercise, and comprehensively reported upon. The client can choose the level of direct support that he wishes to give to the activity, and this will vary depending upon the resources available.

Thus field marketing offers a flexible answer to sales and marketing issues that a client might face, both short and long term.

Time scales can often be telescoped as the field marketing company will already have an experienced in-house solution to the management of the project, and an infrastructure to support this management: ie IT support, personnel and a payroll function in line with the latest EU employment laws.

The result of field marketing is that the client receives a service that is focused on his objectives, enabling him to spend more time on his core development.

## A brief history of field marketing

The UK field marketing industry currently employs 15,000 staff through over 30 companies with a combined billing of £350 million, hence the need for an industry body.

Field Marketing can trace its origins back to the 1930's when independent retailers were still a major force in British retailing and the novel idea of 'self service' had yet to hatch.

Consequently, there were a few small companies that would visit these outlets on behalf of manufacturers to leverage the valuable space on the 'counter' over which all products were served. Placement in the prime position on the counter invariably led to increased impulse purchases, an entity that has now come full circle.

With the development of the major multiple supermarkets like Tesco and Sainsbury that grew rapidly during the 1960's and 1970's, the emphasis switched towards representation at store level. This led to the establishment of four companies providing merchandisers, tactical salesforces and sampling.

It was in the late 1970's that the multiples introduced planograms, which reduced the opportunity to negotiate for space locally, this also resulted in a shift towards more sales related activities. During this time, the number of manufacturers turning to outsourced sales and merchandising teams increased and so too has the number of field marketing companies.

The services of the industry further developed into auditing, mystery shopping and event management to name but a few, and large outsourcing contracts became common between the major FMCG manufacturers and the field marketing companies. As the ability of the field marketing industry diversified to encompass more disciplines, the emphasis moved back to the independent sector. Manufacturers realised this sector still has a significant contribution to make in terms of volume and profit. This caused exponential growth in the industry in value terms where the industry has been growing at a rate of 25% year on year.

A further milestone in the industry came in 1997 with the deregulation of utilities and field marketing moving into doorstep selling. This activity alone is estimated to have contributed in excess of £40m to the industry.

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**Potential users**

- food – retail, wholesale, workplace, leisure outlets;
- drink – soft, alcoholic;
- on premises (pubs/clubs), take home;
- tobacco;
- IT;
- pharmaceuticals/pharmacies;
- personal care/health and beauty;
- confectionery;
- stationery;
- snacks;
- vending;
- security systems;
- domestic appliances;
- services – utilities, telecommunications;
- financial services, internet;
- cleaning and sanitary products;
- travel agents;
- FMCG sector;
- durable sector;
- multiple grocers;
- convenience stores;
- garage forecourts;
- cash & carry outlets;
- department stores.

# Sales

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## Definition

To achieve the sale of a product or service on a face to face basis.

Sometimes referred to as:

- blitz activity;
- car sales drive;
- commando sales force;
- ex-car sales.

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## Types of sales

There are two types of sales activity, defined in terms of time:

### 1. Strategic/contract

The provision of sales resources for a prolonged period to achieve long term objectives. Effectively the contracting out of sales activity where the client company has no desire to carry the central infrastructure necessary to maintain a field sales resource.

### 2. Tactical

The provision of sales resource to achieve short term objectives.

A combination of both can be used together to cover seasonal variances. Tactical can also be used intermittently where regular activity is required but with intervals between activities.

There are two types of sales activity defined by customer:

**Business to business – Visiting businesses to obtain sales, and distribution of products and services.** This activity is not restricted to product sales but includes utilities, telecoms, security, insurance and other services.

**Business to consumer – Selling direct to the end user.** A significant amount of this activity is conducted face to face in consumers' homes. The use of the activity has been adopted especially by telecom and utility companies to discuss product features and benefits directly with the consumer in their home or place of work.

As well as selling on a face to face basis in consumers' homes, there is a significant amount of sales activity conducted in public places. This activity is covered more specifically in the Demonstrating and Sampling Section.

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## Potential users

As above.

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### Potential benefits

- profit;
- accountability;
- flexibility.

Contracting out sales resource will enable a cost-benefit analysis to be conducted, thus making field marketing very accountable.

Additionally, the flexibility to react quickly to organisational needs at short notice, or to switch activities geographically or demographically is facilitated by the ability to call on a field marketing database of sales resources.

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### Expertise

The extensive knowledge of a field marketing professional, enables client business plans to be executed and objectives achieved using a flexible and skillful resource.

# Merchandising

Sometimes referred to as:

- point of sale placement;
- shelf stacking;
- display construction.

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## Definition

Merchandising activity is designed to ensure success in the battle for space in the retailing sector in terms of space allocation and effective utilisation. If planograms exist, standardised presentation can be achieved on a national scale with feedback to suppliers relating to the status of displays prior to commencement of merchandising. Merchandising visits provide the opportunity to rotate stock and monitor out of stock scenarios.

The professional and timely implementation of Point of Sale materials is often crucial to the success of a product. In its' fullest sense, this involves the distribution of materials either to the merchandiser or if this is impracticable, direct to location.

Whilst merchandising should form part of the ongoing strategy of ensuring product profile, it is particularly important at the time of product launch or during seasonally significant sales periods.

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## Types of merchandising

### Strategic/contract

Ongoing merchandising support over an extended period of time where the desire is to maintain consistent standards and profile.

### Tactical

Generally one-off activities to support product launch or re-launch or during seasonally significant sales periods.

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## Potential users

As above.

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## Potential benefits

- additional sales;
- maximum space utilisation;
- standardised presentation;
- promotional compliance;
- in-store profile;
- management information.

# Demonstrations, sampling and roadshows

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## Definition

In a broad sense, all categories provide the opportunity to try, test or explain the benefits of a range of products or services. The essence of the project is to encourage the consumer to sample or view the offer. Compelling statistics are available to support the impact on sales and brand awareness of this face-to-face approach.

The demonstration and sampling of hot and cold foods, drinks and beauty products is commonplace. Historically demonstrations have focused upon products, such as household appliances, but increasingly this approach is forming a key element of the sales process for other sectors, for example telecommunications and financial services.

### Sometimes also referred to as:

- promotions;
- experiential and event marketing;
- concourse events (ie: activity conducted in shopping or railway concourses).

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## Types of demonstrations, sampling, roadshow activity

### Strategic/contract

Ongoing representation in specific locations in order to ensure consistent profile and market approach. This can apply to food, drinks, equipment/appliances.

### Tactical

To support a product launch or re-launch or during seasonally significant sales periods.

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## Potential users

As above.

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## Potential benefits

- increased sales;
- opportunity to assess customer reaction;
- product profile;
- in-store theatre.

# Auditing

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## Definition

The process of measuring and reporting on:

- clients' products;
- availability;
- range;
- promotions;
- placement;
- price;
- orders;
- out of stock;
- use of Point of Sale (POS) or point of purchase materials;
- competitor products.

A trained impartial agency is best placed to execute this activity to add objectivity.

Auditing has traditionally been carried out in the retail environment but its use is now being valued across a much wider spectrum of sale and purchase situations including Business to Business.

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## Types of auditing

- Covert Audit – Observation checks made and an audit report completed off-premise.
- Overt /Reveal and Audit – Presentation made and audit carried out with full local or head office retailer permission. This may involve the taking of photographs.

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## Potential users

As above.

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## Potential benefits

Auditing is used both as an intrinsic part of a sales & marketing programme and to measure compliance.

Auditing can be used to deliver:

- management focus – supplier and/or retailer/reseller;
- staff involvement and training;
- supports individuals and teams;
- rewards agreed compliance and gives feedback on poor compliance;
- ability to measure standards independently;
- encourages the raising of standards;
- outlet compliance to national agreements.

# Mystery shopping

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## Definition

The process of measuring and reporting covertly on customer service and sales standards at the 'moment of purchase'.

A trained independent agency staff member posing as a genuine shopper or consumer is best placed to carry out this activity.

Mystery shopping has traditionally been carried out in the retail environment and in the business to customer environment but its use is now being valued across a much wider spectrum of customer service situations including Business to Business.

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## Types of mystery shopping

- 100% Covert – purchase made with no reveal and report made centrally.
- Covert and Reveal – purchase is made, and after this there is a reveal; this is often with on-the-spot rewards. The report is then made locally and/or centrally.

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## Potential users

As above.

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## Potential benefits

Leading proponents use mystery shopping both as an intrinsic part of their staff motivation programme and to measure customer service standards benchmarked across the business.

### **Mystery Shopping can be used to deliver:**

- management focus;
- staff commitment and involvement;
- motivation for individuals and teams;
- staff rewards;
- ability to measure standards and training retention independently;
- raised standards.

## Added value and emerging disciplines

Whilst the following are not as yet considered to be core disciplines in field marketing, they are emerging in many field marketing companies to become an important part of the marketing mix:

- telemarketing/telesales;
- market research;
- handling, packing and redemption;
- warehouse and distribution facilities.

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### Telesales

Increasingly clients needs often require an integrated face to face and telemarketing solution. By the use of targeted media and telephone response management, the customer can be managed through to a sale either over the phone or by a follow up field visit. Increasingly sophisticated telephone software and analysis of data from telephone and field activities can provide a very cost effective solution to a variety of marketing requirements.

## Getting the best value out of field marketing

Each campaign is entirely individual, designed specifically to meet the client's requirements and targeted to meet the campaign objectives.

The content of the face to face contact made during the campaign may include a mix of several of the disciplines described earlier in this document. For example a retail merchandising call might also include an audit, in-store staff training and sales, and may even be followed with a telesales call.

It is very important that the client or agency approaches the field marketing company as early in the development stage as possible. This ensures that the client obtains the best planning, involving the expertise of field marketers producing campaigns that maximise the value of the planned objectives, and often exceeding them.

In field marketing planning is crucial, and the more time available to prepare, the better the results.

The client is best served when they:

- involve the field marketing company at an early stage;
- are clear about his objectives;
- agree the critical timing issues;
- adhere to the critical timing.

The field marketing company will then:

- achieve the best financial result for the client;
- ensure the objectives and processes are realistic, based on their past experience;
- advise the client on the critical timing;
- give advice on added benefits of including other activities and extend the value of any projects undertaken;
- implement the exercise according to the critical timing previously agreed;
- audit the results;
- devise the relevant reporting to meet the client's requirements.

Above all, the client and the field marketing company should work as a partnership; after all they have one common aim – that the exercise should achieve the very best results possible.

## Case studies

# Sales

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## Tactical sales – Client: Manufacturer of cereal snack product

### Objective

To spend £1 million on TV advertising and needs to ensure product availability in TV regions.

### Process

- identify target market (demographics) and identify appropriate outlets in TV region to sell to with ideal target of 10,000 distribution points;
- journey plan outlets to sensible journeys to allow one visit to collect stock daily using refrigerated vehicle;
- train personnel in features and benefits of product and how to sell to target market in identified outlets;
- complete operation in 20 working day period to conclude day prior to TV advertising breaking;
- report to client on distribution, volume, cash transactions and future recommendations.

### Results

- out of 10,000 outlets targeted, 9,180 outlets called on where decision makers were seen and presented to;
- 85% of all calls made sold to, merchandised product and completed cash transaction;
- broad product availability for TV advertising commencing.

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## Contract sales (Domestic door to door) – Client: Utilities company

### Objective

As part of the de-regulation of the utilities market, to supply a door to door field force for a major electricity supplier to sell gas contracts in the residential market in the Midlands and achieve 110,000 sales within ten months while maintaining a high level of client credibility.

### Process:

- advertised for experienced sales people to supplement existing field resource;
- 200 recruited and attended a two-day training course;
- six teams of four (three team members and one team leader) reported to area controllers who in turn reported to a field manager;
- field trainer was also supplied for on-going field training support.
- the operating systems employed for the exercise were set up in line with current Ofgas regulations;
- stringent rules were applied and monitored to ensure the activity was conducted in a manner that would not compromise the rights of consumers or the reputation of the client: advertising, recruitment processes, the taking up of references on all field personnel, training, in-field training and analysis of the work being completed each week.

**Results**

- achieved the 110,000 sales within seven and a half months, at 23% over target;
- recorded very low Gas Consumer Council complaints compared to companies operating within other areas.

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**Sales – Client: A major soft drinks supplier****Objective**

To increase distribution of a soft drink in independent CTNs, sandwich bars and similar outlets within the M25.

**Process**

- seven teams of three (one driver and two sales personnel) recruited and provided with a van in which stock was collected daily from the nearest cash and carry outlet;
- each team was provided with a clearly defined area in which to 'blitz' all suitable outlets over a two week period;
- sales personnel presented the product and the deal to the retailer and on achieving an order, collected payment. The driver effected immediate delivery of stock to the outlet and was responsible for security of the van and the money;
- at the end of each day or the following morning, the team returned to the cash and carry using the money collected during the day to rebuild stock levels ready for that day's activity.

**Results**

- distribution over the whole area increased by 40%;
- stock levels increased in existing stockists;
- client received clean database of stockists, new customers and non-stockists for mailing and follow-up purposes.

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**Sales – Client: Popular hotel chain****Objective**

- to target approximately 2,400 selected independent travel agents nationwide to highlight key selling points applicable to each of the client's campaigns;
- to increase travel agency awareness and display racking of client brochures thus increasing sales.

**Process**

- provide and manage a dedicated travel field sales team and thoroughly train on client product;
- set up yearly briefing meetings at brochure launch time;
- participate in training representatives on client Viewdata system to enable thorough training of agents and encourage them to book via computer;
- implement agreed calls into a database set up on client's behalf;
- produce representative area listings by postcode;
- produce tailor made report forms designed to collate specific data.

**Results**

- 2,774 travel agents visited;
- racking of client brochures increased from 46% of agents to 84%;
- from comparisons made against all competitive products client brochures were seen to have prime racking space in agents visited;
- detailed analysis of client brochure racking by representative area;
- competitor and promotional activity highlighted.

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**Strategic sales – Client: Manufacturer of alcoholic spirit****Objective**

- to increase exposure to 18-30 year olds;
- to increase volume by 10% in 'on premises' sector.

**Process**

- sales team of 20 recruited to reflect current market;
- database compiled of outlets known to be frequented by target market;
- product training and revised method of product presentation completed;
- sales drive to coincide with re-launched TV and airtime activity;
- venues given training in product and presentation along with POS and dispensing items.

**Results****Year 1**

- 32% increase in sales volume;
- 16% increase in distribution.

**Year 2**

- 26% increase in sales volume;
- 12% increase in distribution.

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**Sales – Client: Regional brewer****Objective**

- to increase area of distribution;
- to improve sales to off-trade;
- to achieve a target of 10 calls per day.

**Process**

- monthly deal mix agreed with client;
- sales staff trained face to face on the products by client and account management team;
- weekly journey plans set for sales staff;
- weekly sales report by outlet produced;
- client customer database updated after each stage of activity;
- monthly review of activities and amendment of forward plan.

### **Results**

- 20% increase in outlets listing products;
- sales achieved of 800 cases per week;
- 10 – 12 calls made daily;
- on going van sales activity implemented monthly.

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## **European sales – Client: Worldwide FMCG Group**

### **Objective**

To increase distribution and market intelligence of core brands in independent retail sector across Europe.

### **Process**

- European sales plan based on successful UK model;
- local field marketing agencies selected to meet strict operating criteria;
- administration template set up in the UK;
- central european database and reporting system developed.

### **Results**

- Successful rollout in 10 European countries.

# Merchandising

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## Merchandising and sales support – Client: Pharmaceutical supplier

### Objective

- to merchandise POS in pharmacies within a given time period;
- to build a strong relationship with pharmacists to ensure continued support for the scheme;
- the scheme focused on different products throughout the period.

### Process

- commercial agreement with client;
- review briefing document and paperwork;
- organisation of merchandisers;
- briefing of merchandisers on a national scale;
- taking bulk delivery of all POS and associated materials;
- distribution of POS to merchandisers;
- hotline for problem solving;
- collation of paperwork and updating database;
- client report and analysis.

### Results

- 600 – 800 visited on the first Monday and Tuesday of each month to ensure all POS were in place for the start of the promotional period. Activity was key to increasing sales of products on offer.

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## Merchandising – Client: Major confectionery company

### Objective

- to visit 12,000 independent outlets to re-planogram displays and replace brand identification decals to incorporate a new chewing gum product;
- to feedback information on display position, out of stock situations, current products sold and competitor activity.

### Process

- predetermined journey plans were followed by 40 merchandisers to optimise call efficiency;
- each merchandiser carried supplies of new BID's for each product range and samples of the new product;
- a comprehensive report form was completed for each call, indicating the status of each display, which products were currently being stocked and confirmation of call completion.

### Results

- sales of the new chewing gum product increased by 18%;
- sales of the product category overall increased by 3%;
- customer database was updated to show current stock situation and competitor activity.

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**Merchandising – Client: Major petroleum company****Objective**

- service station forecourt re-fit through;
- provision of on-site contract management and merchandising personnel;
- control and scheduling of day-to-day running of forecourt convenience store re-fits from hand-over to re-launch/completion date.

**Process**

- two weeks notice given by client of store locations for re-fit together with all relevant information relating to personnel requirements, project duration, shift hours to be worked and all supplier details;
- provide an experienced team of merchandisers and utilise their skills to achieve client specifications;
- report daily activities and scheduling to client's Retail Development Manager;
- confirm that all suppliers have been scheduled;
- fully merchandise product lines to planogram;
- record information in re-fit manual/operational procedure guide;
- ensure all suppliers meet client requirements.

**Results**

- client completely satisfied with performance and quality of work achieved;
- appointment as exclusive contractor for all client new store and re-fit merchandising developments.

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**Merchandising (Compliance Audit) – Client: Major detergent manufacturer****Objective**

- to set up, merchandise and audit promotional displays within 350 multiple and independent cash & carry outlets;
- to set up promotional and competition activities;
- to merchandise other client products.

**Process**

- provide and manage a third party merchandising team;
- recruit personnel with relevant merchandising experience;
- produce detailed brief and ensure merchandisers are fully aware of procedures for the activity;
- journey planning;
- arrange vehicle hire for transportation of promotional materials;
- distribute all promotional materials to merchandisers;
- design and produce tailor made report forms for collation of all relevant data;
- produce detailed analysis report for client.

**Results**

- all cash and carry outlets covered within five days;
- increased sales of client products during four-week period of displays in cash and carry outlets.

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## Merchandising – Client: Major confectioner

### Objective

to introduce a new range of counter units to the independent confectionery sector to complement promotional offerings and new products.

### Process

- commercial agreement with client;
- detailed briefing document to client including project objectives, suggested dialogue with retailer, full logistics and full visit questionnaire for subsequent reporting;
- organising merchandising teams nationally: analysis of coverage required by postcode, assessment of merchandisers suitability and availability;
- briefing merchandisers on a national scale;
- taking delivery in bulk of all counter units and associated materials with 140,000 units handled in two weeks;
- distribution of units to merchandisers;
- client report.

### Results

- 21,000 independent retailers received a visit in a 15-day cycle thus ensuring maximum impact, in line with client expectation. The speed with which the units were put in place facilitated early merchandising of new products and maximum launch impact.

# Sampling/Demonstrations

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## Sampling – Client: Major soft drinks company

### Objective

- to visit on trade public houses and nightclubs to heighten the profile of a new adult soft drink in three variants;
- to gain listings and place point of sale;
- to research customer perception of the brand.

### Process

- 40 individual sampling agents visited 1000 outlets to give out samples of the three variants of adult soft drink;
- free entry into a competition in return for completion of a customer feedback questionnaire.

### Results

- 99% of venues were sampled with an average of 118 samples given out at each outlet;
- the research indicated that 74% of those taking a sample would buy;
- the 'best liked' feature was taste;
- the activity encouraged additional listings;
- sales volume increased by 75% during the campaign.

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## Sampling – Client: FMCG Sector

### Objective

to create and build awareness of brand association with a major sporting championship.

### Process

- commercial development with client;
- full team briefing document and logistical solutions;
- liaison with internal client side logistical team to source chilled product and guarantee delivery;
- briefing handling house and all promotional team;
- organisation of staggered delivery of product/coupons to venue;
- organisation of on site distribution of free chilled product and MNOP coupons over a two week period;
- client report.

### Results

- with only a limited stock of product, over eleven days of activity a successful implementation included;
- 72,000 x 180ml cans distributed;
- 68,000 MNOP coupons distributed of which 8% were redeemed.

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### Sampling – Client: Major snack food company

#### Objective

- to sample and sell eleven low performing snack products in national Cash & Carry promotions (275 different outlets);
- to increase sales and awareness of these products through sales of special offers;
- to administer and promote customer prize draws and raffles in each branch;
- to erect POS material in each store;
- to monitor sales and reaction to products;
- to complete between one to five days of demonstrations over a five week period.

#### Process

- all Cash & Carry branches contacted to confirm stock availability and preferred days for activity;
- detailed staff planning to ensure continuity over five week period;
- detailed written briefing document agreed with client to ensure objectives are achieved, plus planogram details for POS;
- sales monitored weekly and deal amended on sales staff recommendation resulting in a significant uplift in performance;
- detailed client report – sales by product, by branch and analysis of trends.

#### Results

- 614 out of 623 demonstrations completed ie. 98.6%;
- 19,633 cases of product sold, an average of 32 cases per demonstration;
- exercise completed within budget and set targets achieved;
- store delivery problems identified and rectified at an early stage;
- successful implementation of a change to the deals two thirds of the way through the exercise in response to staff comments. This resulted in a significant uplift in rate of sale for the last third of the activity.

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### Sampling – Client: Major Food Manufacturer

#### Objective

- to test public reaction to a re-formulated iced tea drink following an unsuccessful launch three years previously;
- distribution and therefore sampling and merchandising activity concentrated in South East to assess feasibility of national roll-out in 2000/2001.

#### Process

- sample delivery 10,000 per day;
- sampling of product in shopping centres from highly branded stand.

#### Results

- over 80% of those sampled rated product excellent or good;
- almost 80% of those sampled said they would definitely or probably buy the product;
- all comments made were recorded;
- results provided a significant contribution to client decision to proceed with national roll-out.

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### Sampling – Client: Website design agency

#### Objective

to create awareness of new website for online restaurant booking service

#### Process

- staff dressed as waiters handed out miniature branded Danish pastries at London Underground stations during one morning rush hour between 7.30am and 9.30am.

#### Results

- 70% hit rate on website;
- 70% of those sampling logged on to the website before 10am;
- agency now committed to similar activity for other clients.

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### Instore demonstrations – Client: High Street retailer

#### Objective

to effectively demonstrate and sample a range of health and beauty products to consumers in one hundred key stores.

#### Process

- contract agreement with client;
- complete briefing document;
- brief 200 demonstrators at regional face to face briefings including make over training;
- co-ordinate demonstration and sampling stock-kit collation, packaging and delivery to demonstrators;
- two demonstrators work per store to maximise customer interaction;
- complete in store product demonstrations and make-overs for a range of 20 health and beauty products;
- weekly reports to client and end of activity report.

#### Results

- 400 demonstration days completed, 4000 customers sampled;
- product sales increase levels achieved;
- increased retailer awareness with target customers.

# Auditing

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## Auditing – Client: Major household products company

### Objective

- to provide a six month trial as a test;
- to increase amount of product on shelf;
- to ensure correct pricing of stock;
- to increase brand awareness at branch level;
- to ensure promotions were accurately priced and implemented.

### Results

- 15% increase within the cash and carry;
- 90-93% success, hitting 160-165 stores out of 178 every call cycle;
- one year strategy programme developed – on-going every three weeks;
- roll-out to all cash and carries.

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## Auditing – Client: Major supplier of frozen foods to the grocery multiple sector

### Objective

- to monitor implementation of agreed planogram;
- to encourage correct implementation;
- to report back to client on a day to day basis.

### Process

- auditors called on 400 branches of a major grocery multiple within a three day period and completed a report form indicating levels of compliance with planogram by product;
- audit presented to relevant Section Manager and areas of non-compliance identified;
- manager influenced and in some cases assisted, to relay fixture to planogram ensuring client's products achieved agreed facings and stock levels;
- audit form faxed to agency for monitoring and analysis.

### Results

- implementation of agreed planogram achieved in 96% of stores within a three day period;
- client given a 'snapshot' of situation in all stores in which product was listed and planogram agreed;
- the information provided national account management with a negotiating advantage vis-à-vis the multiple;
- sales of the product passed anticipated levels as a result of correct implementation of planogram.

# Mystery shopping

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## Mystery shopping – Client: Government Body

### Objective

to assess how effectively their mission had been adopted by various retailers who were 'mystery shopped' thereby tracking their performance with particular emphasis on POS and key pieces of equipment.

### Process

- questionnaire development and design;
- database design;
- full briefing document with telephone follow-up;
- activity in 1200 retail outlets (1200 visits) over a four month period;
- hotline for problem solving;
- questionnaire collation;
- data capture of results;
- client report and analysis.

### Results

- identification of key strengths and weaknesses in retailers' knowledge of the Government Body's mission;
- tracking improvements in overall performance;
- 1200 visits successfully completed over a four month period.

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## Mystery shopping – Client: A major UK brewer

### Objective

to check that the agreed promotion of a premium beer was being implemented and the product itself being served correctly to customer.

### Process

Teams of two (one mystery drinker and one driver) called on 1200 pubs within a two week period, three times per annum for three consecutive years. They recorded:

- whether the beer on promotion was offered;
- whether the service criteria for the product were met.

If the outlet was successful on both counts a prize was immediately awarded. The perceived value of the prize increased with each cycle and all outlets which won on every cycle entered a major prize draw. In the event of the criteria not being met, the mystery drinker left a sticker on the base of the glass indicating a call had been made.

### Results

- the agency produced results by outlet each cycle, cumulative throughout the year and year on year;
- training needs in individual outlets were identified and addressed;
- pub staff were motivated by the opportunity to win instant prizes of increasing perceived value.
- implementation of promotional activity increased on a 'pub by pub' basis;

## DMA field marketing council

**The DMA would like to thank the following members of the Field Marketing Council for their contribution to this document:**

Alison Williams	01227 741 111	awilliams@fds-uk.com
Andy Shipton	01727 845 637	andy.shipton@smc.co.uk
Martin Kiddle	01844 275 199	martink@zoopeople.co.uk
Gareth Onions	0121 733 7633	garethonions@dspsfieldmarketing.com
Brona Connolly	020 8875 0875	brona.connolly@cmg-europe.com
Sue Quest	01628 774 848	sue@questfm.co.uk
Mike Garnham	01932 560 650	mg@headcount.co.uk
Derek Noakes	020 7269 1700	derek_noakes@gsd.co.uk
Lynda Edge	01753 606500	ledge@milton-pdm.co.uk
Graeme Carpenter	0141 427 6884	graemecarpenter@msn.com
Kate Carr	01844 337 400	katecarr@fmcgltd.co.uk
Mike Hughes	01844 261 777	mikeh@uk.cpm-int.com
David Carter	01903 212 166	msf.ltd@btinternet.com
Gill Dunsford	020 8875 311	gill@impetuscom.co.uk
Francesca Morgan	020 7269 1703	francescamorgan@gsd.co.uk
Richard Finch	020 7734 6064	richard@sure.co.uk
Nick Conway	01844 261 777	nick@uk.cpm-int.com