REILLY
SALES CONSULTING

MODERN FIELD SALES KIT V 1.0

TOOLS, TACTICS, AND PSYCHOLOGY FOR MODERN FIELD SALES TEAMS

MODERN FIELD SALES KIT

The **Modern Field Sales Kit** is crafted for industrial sales teams aiming to modernize their approach. Inside, you'll find resources to:

- Improve rep consistency
- Streamline CRM workflows
- Accelerate deal velocity

Equip your team with the tools needed to thrive in today's competitive landscape.

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CRM HYGIENE & SALES OPS CHECKLIST

CLEAN DATA. CLEAR PIPELINE. STRONGER FORECASTS

Audience: Sales ops leads, field managers, RevOps, reps responsible for self-managed pipelines

What It's For:
Most field sales CRMs are **80% fluff and 20% truth.** This checklist helps your team maintain clean, high-signal data that drives confident forecasts, smart coaching, and fewer end-of-quarter fire drills.

CRM HYGIENE & SALES OPS CHECKLIST

DAILY OR ONGOING REP TASKS

✅ Log new contacts within 24 hours of meeting

✅ Add notes from every customer conversation (email, call, site visit)

✅ Update next step, sales stage, and expected close date after each interaction

✅ Use consistent naming for deals, stages, and notes

✅ Set a calendar reminder to check your pipeline every Friday

✅ Flag all inactive and duplicate accounts and contacts for deletion

WEEKLY SALES MANAGER REVIEW

✅ Pull pipeline by stage and confirm deal progression

✅ Spot deals with no activity in 14+ days and flag for rep follow-up

✅ Flag close dates pushed 3+ times and ask why

✅ Validate forecast vs weighted value

✅ Check for duplicate accounts or ghost opps

✅ Flag aged opps for follow up or deletion

MONTHLY OPS AUDIT

Field	What to Check	Why It Matters
Deal Stage Hygiene	Do deals reflect *actual* status?	Prevents sandbagging / over-forecasting
Contact Role Data	Are buying roles tagged (DM, influencer, tech gatekeeper)? Are key roles missing?	Sharpens multi-stakeholder strategy
Close Date Drift	How many deals slipped 2+ months?	Reveals false confidence
Activity Recency	Are reps updating notes or ghosting CRM?	Drives rep accountability
Data Fields	Are required fields complete?	Enforces deal quality
Account Last Activity Date	Are we reaching out to all our top accounts and prospects on a quarterly basis?	Ensures proper territory coverage
Aged Opps	Do we have old opps that are inflating our pipeline?	Ensures pipeline accuracy

QUARTERLY CLEANUP

✅ Archive stale opps with no movement in 90+ days

✅ Reassign inactive accounts or churned contacts

✅ Review pipeline coverage by territory or rep

✅ Refresh dashboards for new quota or product priorities

✅ Host “CRM Spring Cleaning” session with reps

CRM USAGE SCORECARD (OPTIONAL ADD-ON)

Rep	CRM Score (1–5)	Comments
Jake	4	Pipeline clean, but inconsistent next steps
Nina	5	Gold standard: always updated, clear notes
Luis	2	Needs weekly coaching and follow-up reminder

Use for 1:1s, promo readiness, or rep recognition

⭐ **Pro Tip:**

If it’s not in the CRM, then it didn’t happen. But that doesn’t mean “more fields.” Focus on **fewer inputs, better habits**, and coaching based on *signal*, not status.

DEAL DESK PLAYBOOK

STREAMLINE CUSTOM QUOTES, APPROVALS, AND PRICING EXCEPTIONS WITHOUT SLOWING DOWN SALES

Audience: Sales ops, regional managers, finance leads, field reps handling custom or complex deals

What It's For:
In industrial sales, complex deals often stall at the quote or approval stage. This playbook gives you a simple, fast-moving **deal desk process** so reps can close strategic deals without pricing chaos or approval delays.

DEAL DESK PLAYBOOK

STEP 1: DEFINE THE DEAL DESK PURPOSE

"The Deal Desk exists to support reps in pricing, structuring, and accelerating complex deals without compromising margin, brand, or terms."

Use it for:

- Custom bundles or specs
- Volume discounts
- Partner/co-brand pricing
- Net new territory or large accounts
- Expedited delivery or payment term exceptions

STEP 2: DEAL DESK SUBMISSION TEMPLATE

Field	Example
Rep Name	Maria G.
Customer	DynaDrill Inc.
Deal Value	$84,500
Standard SKU(s)	T-950, FSX-200
Requested Discount	12%
Justification	First-time buyer, strategic logo, large follow-on deal forecasted
Timeline	Needs PO signed by end of month
Risk/Flag	Payment terms request (Net 60)

Add checklist: Has the rep attached quote file, CRM notes, customer tier?

STEP 3: APPROVAL MATRIX BY DISCOUNT THRESHOLD

Discount Range	Approval Needed
0–5%	Rep Discretion
6–10%	Regional Manager
11–15%	Sales Director and Finance
>15% or Custom Scope	Deal Desk Panel (Sales and Ops and Exec Sponsor)

Optional: Auto-trigger email notifications from CRM or quoting tool

STEP 4: DEAL DESK MEETING CADENCE

Asynchronous (Fast Deals):

- Slack or email-based approvals
- 24–48 hour turnaround
- Auto-approval for under X%

Synchronous (Strategic/Big Deals):

- Weekly 30-min deal desk sync
- Use shared agenda:
    - Deal name and owner
    - Request summary
    - Margin impact
    - Decision and comments

STEP 5: POST-APPROVAL PLAYBOOK

✅ Update CRM with final approved terms
✅ Notify rep and update quote within 24 hours
✅ Log decision notes for pattern tracking (competitive info, rep patterns, etc.)
✅ Review exceptions quarterly → feed into pricing strategy

⭐ **Pro Tip:**

Deal desks doesn’t kill speed, they protect margin while enabling velocity. The key is clarity and fast paths for common cases.

⭐ **Pro Tip:**

Deal desks can be a major source of competitive intelligence. They should track which competitors you lost to, and at which price points. This information should be leveraged for strategic corporate initiatives.

SALES TERRITORY MAPPING TOOL

MAXIMIZE COVERAGE. REDUCE REP OVERLAP. DRIVE PIPELINE DENSITY WITH SMART TERRITORY DESIGN

Audience: Sales directors, territory managers, regional VPs, RevOps

What It's For:
Industrial sales orgs often operate with outdated or vague territory structures. This tool helps you map and balance rep assignments based on opportunity, geography, and strategic accounts, **not just zip codes**.

SALES TERRITORY MAPPING TOOL

STEP 1: DEFINE TERRITORY INPUTS

Field	Example	Description
Region	Midwest	Broad assignment zone
Zip / Postal Codes	60540, 60062, 46360	Granular boundaries
Industry Focus	Aerospace, HVAC, AgTech	Align reps to verticals they know
Strategic Accounts	GE Aviation, Carrier, Deere	Must-have assignments
Travel Radius	150 mi	Based on in-person visit capacity
Rep Assigned	Jessica R.	Primary contact
Pipeline Potential	$1.2M	Est. 12-month revenue
Current Customer Annual Revenue	$800k	Average base customer annual revenue over the past three years

Track all fields in a shared CRM view or spreadsheet

STEP 2: SCORE TERRITORY OPPORTUNITY

Assign a score from 1–5 for:

- **Account Density** (how many buyers in region?)
- Average Deal Size Potential
- Travel Efficiency
- Tech Stack Fit / Product Match
- Competitive Saturation
- Base customer count and annual revenue

📊 **Add a “Territory Health Score” column to your sheet for prioritization.**

STEP 3: SPOT OVERLAP AND REASSIGNMENTS

Use this checklist:

✅ Are any reps calling into the same zip/postal ranges?
✅ Are high-potential zones under-covered or over-split?
✅ Is there a plan for trade show follow-up by rep/region?
✅ Can any reps take on hybrid vertical and geo roles?
✅ Are all major verticals fully covered?
✅ Do any territories have geographic ‘dead zones’?
✅ Flag all outliers (major accounts that require above average travel time)

STEP 4: PLAN COVERAGE CADENCE (QUARTERLY)

Territory	Priority	# of Key Accounts	Visit Cadence	Touchpoint Plan
Northern IL	High	12	Monthly	In-person visit and check-in call
Central OH	Medium	7	Bi-monthly	Zoom and one site visit
Southern IN	Low	3	Quarterly	Digital-only follow-up

⭐ **Pro Tip:**

Territory isn't just about where reps live. It's about **where revenue lives**. Design coverage based on potential, not tradition.

PRODUCT TRAINING MANUAL TEMPLATE

EQUIP YOUR SALES TEAM TO SELL SOLUTIONS, NOT JUST SPECS

Audience: Sales enablement leads, product managers, field sales trainers

What It's For:
In industrial and manufacturing sales, reps often lean too heavily on product specs. This manual helps teams explain **why it matters, not just what it is**, so they can sell outcomes, not just components.

PRODUCT TRAINING MANUAL TEMPLATE

SECTION 1: PRODUCT OVERVIEW

Field	Example
Product Name	FlexSeal 9000
Category	HVAC Sealant
Launch Date	Q1 2024
Primary Buyer	Facilities Manager, OEM Engineer
Lifecycle Stage	New / Flagship / End-of-life

Include product photos or application images for context

SECTION 2: KEY FEATURES AND SELLING BENEFITS

Feature	What It Does	Why It Matters
Withstands -40°C	Maintains seal integrity in harsh temps	Prevents winter outages in outdoor units
Cures in under 30 mins	Fast deployment in field repairs	Cuts downtime on high-priority jobs
Non-toxic formula	Safe for indoor use	Reduces EHS risk, ideal for hospitals

Train reps to always lead with the third column

SECTION 3: IDEAL CUSTOMER USE CASES

- **OEMs:** Incorporate into production spec
- **Service Techs:** On-site system repairs, fast turnaround
- **Distributors:** Bundle with seasonal maintenance kits

Bonus: Include sample project snapshots (before/after, ROI, install images)

SECTION 4: COMPETITIVE DIFFERENTIATORS

Competitor	Key Weakness	How We Win
SealCo Pro	24hr cure time	We cut turnaround by 93%
InstaFlex	Poor adhesion on metal	Our blend holds on coated and bare metals
Standard Seal	VOC compliance issues	We meet all LEED and EPA standards

Include objection-handling lines for each

SECTION 5: PRICING, SKUS, & PACKAGING

- MSRP and standard discount range
- SKU numbers and sizes
- Order minimums / bundle packs
- Cross-sell/upsell SKUs (e.g., application kits, cleaners)

Tip: Highlight "Frequently bundled with..." add-ons

SECTION 6: INTERNAL FAQ & SUPPORT CONTACTS

Common Sales Questions:

- "Can this be stored outdoors?"
- "Does it bond with copper piping?"
- "What are the shelf life and storage specs?"

Support Directory:

- Product expert: John @ ext 241
- Logistics contact: Maria @ ext 356
- Marketing collateral request: marketing@rsc-industrial.com

⭐ **Pro Tip:**

Turn this manual into a **5-minute eLearning module** or PDF for each new product. When reps understand the story, not just the specs, they close faster and upsell easier.

FIELD SALES PLAYBOOK

EQUIP YOUR REPS WITH THE STRUCTURE, SCRIPTS, AND SYSTEMS TO WIN IN EVERY ACCOUNT

Audience: Industrial field reps, regional sales managers, enablement leaders

What It's For:
In industrial and distribution sales, reps often operate on legacy habits or tribal knowledge. This playbook gives your team a **clear, repeatable system** to plan their weeks, structure their calls, and close bigger deals consistently.

FIELD SALES PLAYBOOK STRUCTURE OVERVIEW

SECTION 1: IDEAL CUSTOMER PROFILE (ICP)

Who We Serve Best:

- Facilities managers at OEMs
- Plant engineers in food & beverage
- Fleet maintenance leads (transport, logistics)
- Contractors sourcing high-volume consumables

✳️ Include buying triggers like:

- Outdated equipment or tooling
- New compliance standard
- Expansion or M&A activity

- Supplier fatigue or service gaps

SECTION 2: TERRITORY PLANNING FRAMEWORK

Weekly Rhythm:

Day	Focus
Mon AM	CRM & route planning
Mon PM–Wed	On-site visits and ride-alongs
Thurs	Follow-ups and quote work
Fri	Account mapping and forecast updates

Tools:

✅ Route optimization map

✅ Top 20 target account tracker

✅ “Strike list” of dormant or underpenetrated customers

SECTION 3: SALES CALL STRUCTURE (IN-PERSON OR VIRTUAL)

5-Part Field Sales Call Framework:

1. Connect:

“How are things holding up since [last touchpoint/job]?”

2. Confirm Priority:

“What’s been the biggest pain or bottleneck lately?”

3. Show Value:

Share insight, tool, or case story related to their problem

4. Advance:

"Would it help to run a sample or get pricing scoped?"

5. Next Step:

Schedule follow-up → confirm timeline or purchasing process

✳️ **Use clipboard template or mobile form to log notes**

SECTION 4: OBJECTION HANDLING QUICK HITS

- "Too expensive" → TCO reframe
- "Already have a supplier" → Test order pitch
- "Send me info" → Qualify and book next step

SECTION 5: DEAL MOVEMENT CHECKLIST

✅ Is there a confirmed project need or use case?
✅ Has a purchasing window or urgency been defined?
✅ Do we have access to someone who can say yes?
✅ Have we submitted a proposal or quote?
✅ Is there a clear, scheduled next step?

SECTION 6: METRICS THAT MATTER

Metric	Why It Matters
On-site visits/week	Face time = trust = deals
Quotes submitted	Leading indicator of closing
% of pipeline with next step	Health check
Time-to-quote	Sales ops velocity

⭐ **Pro Tip:**

Reps don’t need a binder, they need a field-ready playbook they’ll *actually use*. Keep it digital, mobile-optimized, and reviewed monthly in 1:1s.

FIELD SALES RIDE-ALONG TOOLKIT

TRAIN SMARTER, COACH IN REAL TIME, AND DRIVE PERFORMANCE THROUGH STRUCTURED OBSERVATION

Audience: Regional sales managers, directors, VP of Sales, enablement leads

What It's For:
Ride-alongs are one of the highest-leverage coaching tools in field sales, but most are too informal to move the needle. This toolkit gives you a **repeatable structure** to assess, coach, and upgrade reps during real customer visits.

FIELD SALES RIDE-ALONG TOOLKIT

STEP 1: PRE-RIDE ALIGNMENT (DAY BEFORE)

✅ Select target accounts/visits ahead of time (2–3 ideal)

✅ Confirm what *type* of meeting it is (intro, follow-up, proposal, issue resolution)

✅ Ask the rep:

"What do you want feedback on?"
"What does success look like for tomorrow's meetings?"

✅ Print or preload the **Observation Checklist**

STEP 2: RIDE-ALONG OBSERVATION CHECKLIST

Sales Behaviour	Yes / No	Notes
Prepared with account notes and call plan	✅ / ❌	
Framed meeting goal at start	✅ / ❌	
Asked 2+ discovery questions	✅ / ❌	
Tied product benefits to client's specific use case	✅ / ❌	
Handled objections with clarity and calm	✅ / ❌	

Confirmed next steps and booked follow-up	✅ / ❌	

✅ **Rate overall: 1 = Needs Coaching → 5 = Top Performer**

STEP 3: REAL-TIME COACHING PROMPTS (IN THE FIELD)

Ask post-meeting:

- “What do you think went well?”
- “What would you do differently next time?”
- “What was their biggest hesitation, and how could we have addressed it sooner?”

⭐ Pro Tip: Focus on 1 coaching priority per rep per ride-along. Don’t overwhelm with 8 things.

STEP 4: RIDE-ALONG DEBRIEF TEMPLATE (BACK AT OFFICE OR ON ZOOM)

What to Cover:

- Wins to reinforce
- 1–2 high-impact coaching opportunities
- Questions the rep could ask more effectively
- Any missing steps in deal progression
- Summary of action items and next check-in
- Rep questions

Optional: Add debrief notes to rep's CRM profile or 1:1 tracking doc

OPTIONAL ADD-ONS

✅ Use a scorecard for quarterly ride-along comparisons

✅ Build into promotion/readiness conversations

✅ Record audio snippets (with permission) for coaching bank

⭐ **Pro Tip:**

Great ride-alongs are part coach, part camera. Your job is to help the rep *see what they missed,* not just tell them what you think. Done right, one great ride-along is worth 10 hours of classroom training.

TRADE SHOW PLANNING GUIDE

MAKE EVERY EVENT ROI-POSITIVE, BEFORE YOU EVEN HIT THE FLOOR

Audience: Industrial sales leaders, marketing managers, channel reps, event coordinators

What It's For:
Trade shows are expensive, and most companies walk away with a stack of business cards and no deals. This guide helps you plan with precision, execute with purpose, and follow up with systems that **actually generate revenue**.

TRADE SHOW PLANNING GUIDE

PART 1: 30–60 DAYS BEFORE THE SHOW

✅ Set a Clear Goal

"We want to meet [X target accounts], generate [Y leads], and book [Z meetings] for post-show."

✅ Pre-Book Meetings

- Reach out to key accounts attending
- Book 15-min booth meetups or coffee chats
- Add meetings to CRM with pre-filled info

✅ Prep Your Pitch and Materials

- Refine the 20-second booth hook

“We help [industry pros] fix [problem] with [product/outcome].”

- Build 1-pager takeaway sheets with QR code to lead magnet or catalog
- Prep giveaway if doing one (USB drives, branded tools, free sample kits)

✅ Align Your Team

- Assign booth roles (greeter, demo lead, scheduler)
- Train reps on key messages, objections, and qualifying questions

PART 2: DURING THE SHOW

✅ Capture Every Lead (Digitally)

- Use a shared form or scanner app
- Log: Name, company, role, interest level, priority tag

✅ Booth Flow Tips

- Open with a question (“What brought you by today?” > “Need any [X] this year?”)
- Use product demos or visuals. Don’t rely on brochures
- Keep convos <3 min unless they’re hot leads, then step aside to go deeper

✅ Daily Huddle with Team

What worked today?
What leads need fast follow-up?

PART 3: 48 HOURS AFTER THE SHOW

✅ Send Fast-Follow Emails by Tier

Tier 1 (Hot Leads):

“Great to meet you at [Event], I’d love to dig into how we can help with [their stated pain]. Here’s a quick scheduling link.”

Tier 2 (Warm Leads):

“Thanks for stopping by! Here’s the resource I mentioned. Let me know if you want to explore options.”

Tier 3 (Low Fit / Long-Term):

“I appreciate the visit. Feel free to stay on our radar via [newsletter/resource link].”

✅ Update CRM and Pipeline

✅ Debrief Internally

- Top 5 learnings
- Messaging feedback
- Which collateral landed best
- Which accounts need priority nurture

⭐ **Pro Tip:**

Trade shows aren’t about volume. They’re about **velocity and conversion**. The reps who follow up in 48 hours win 80% of the post-show deals. Make it a system, not an afterthought.

INDUSTRIAL SALES OBJECTION HANDLING GUIDE

DEFUSE RESISTANCE, EARN TRUST, AND CLOSE DEALS IN COMPLEX, TECHNICAL SALES ENVIRONMENTS

Audience: Field sales reps, regional account managers, inside sales support, technical sellers

What It's For:
Objections in industrial sales aren't just about price. They're often rooted in **risk, change resistance, or legacy systems**. This guide helps your team handle tough pushback with confidence, logic, and trust-building language.

COMMON INDUSTRIAL SALES OBJECTIONS AND SMART REFRAMES

1. "WE'VE USED THE SAME VENDOR FOR YEARS."

Default = dead end
Reframe = low-risk test and reliability upgrade

"That makes sense. Long-term vendors are valuable.

May I ask, what's the one thing you wish they did better?"

"What some of our partners do is test us on a small, non-critical order. It lets us prove our value without disrupting anything, and earns trust the right way. A little competition always keeps your current vendors sharper."

✳️ **Psychology: Removes threat of switching by reframing as a trial**

2. “YOUR PRICE IS TOO HIGH.”

Default = discount panic
Reframe = value contrast and risk framing

“Totally fair to look at cost, especially in today’s market.

But if we zoom out: have you factored in downtime, rework, or replacements tied to [current solution]?”

“In most cases, our partners found we were actually less expensive over the lifetime of the [what you’re selling].”

✳️ **Psychology: Anchors to *total cost of ownership*, not sticker price**

3. “I NEED TO RUN THIS BY MY BOSS.”

Default = loss of momentum
Reframe = decision clarity and support material

“Absolutely. What’s typically most important to them: cost, speed, or risk?”

“Want me to send a quick one-pager that makes the case clearly for them?”

“If it’s helpful, I can also join you for a quick call to support the discussion.”

✳️ **Psychology: Keeps deal active by enabling internal champion**

4. “NOW’S NOT THE RIGHT TIME.”

Default = “Check back next quarter”
Reframe = opportunity cost and capacity anchor

“Got it, timing’s everything.

May I ask, if nothing changes in 60 days, what’s the impact?”

“Sometimes, waiting means we hit supply chain delays or price increases.

Want me to pencil in a ship date window now, and we firm it up later?”

✳️ **Psychology: Surfaces urgency without pressure**

5. “WE’RE JUST EXPLORING OPTIONS.”

Default = passive follow-up
Reframe = guided discovery

“That’s a great place to be. Can I help you explore smarter?”

“Want to compare us side-by-side with your current setup? We’ve got a worksheet that breaks it down cleanly.”

✳️ **Psychology: Shifts your rep into *trusted advisor* mode**

BONUS: 3 POWER PHRASES FOR REFRAMING RESISTANCE

- “That’s exactly why teams work with us…”
- “Would it be helpful if I showed you how [Client] handled that?”
- “Most people we work with felt the same way, until they saw…”

⭐ **Pro Tip:**

Your best objection responses are questions. They unlock the *real story behind the surface answer*. Train reps to dig, not defend.

INVENTORY MANAGEMENT CHECKLIST

REDUCE BACKORDERS, INCREASE FULFILMENT SPEED, AND PROTECT MARGINS WITH PROACTIVE STOCK CONTROL

Audience: Sales ops leads, warehouse managers, distributor partners, manufacturing sales directors

What It's For:
Inventory issues quietly kill deals in industrial sales. This checklist helps your team prevent stockouts, overstocking, and missed fulfilment windows, so sales reps can sell with confidence and operations can scale without chaos.

INVENTORY MANAGEMENT CHECKLIST

PART 1: INVENTORY VISIBILITY & TRACKING

✅ Is there a centralized dashboard for live inventory by SKU?
✅ Are all warehouses syncing stock data daily?
✅ Can sales and service teams view current stock levels in real time?
✅ Are serialized or batch-tracked SKUs clearly flagged?
✅ Is your system integrated with distributor portals (if applicable)?

✳️ **Bonus: Add alert triggers for stock < reorder point**

PART 2: REORDER PLANNING & LEAD TIME

Product	Current Stock	Reorder Point	Lead Time	Order Frequency
FS-9000 Sealant	125 units	100 units	10 days	Bi-weekly
AGT-7 Sensor Kit	60 kits	50 kits	21 days	Monthly

✅ Have all critical SKUs been assigned reorder points?

✅ Are lead times adjusted quarterly to reflect supplier performance or seasonal surge?

✅ Do you use "safety stock" buffers for high-volume or flagship SKUs?

PART 3: DEMAND FORECASTING PRACTICES

✅ Are forecasts based on trailing 6–12 month sales data by SKU and territory?

✅ Have marketing campaigns or major bids been factored into forecast models?

✅ Are large/one-time deals excluded from recurring projections?

✅ Do regional sales teams input expected orders into demand plans monthly?

✳️ **Tip: Forecast monthly for fast-movers, quarterly for long-tail SKUs**

PART 4: RECEIVING & RECONCILIATION

✅ Is there a process to verify quantities and condition of incoming inventory?

✅ Do you track supplier on-time/in-full performance?

✅ Are backorders flagged for sales and customer service to manage expectations?

PART 5: AGING INVENTORY & DEAD STOCK MANAGEMENT

✅ Is inventory aged and flagged by 90, 180, 360+ days?

✅ Do you have a plan for moving slow-movers (bundle promos, clearance, etc.)?

✅ Are discontinued SKUs removed from sales rep catalogs and portals?

⭐ **Pro Tip:**

Inventory confidence is a **silent sales weapon**. When reps *know it's in stock*, they close faster, quote cleaner, and avoid deal friction. Build your checklist into weekly ops huddles.

DISTRIBUTOR PARTNERSHIP AGREEMENT TEMPLATE

SET CLEAR EXPECTATIONS, PROTECT YOUR BRAND, AND BOOST CHANNEL PERFORMANCE

Audience: Sales directors, distributor managers, channel ops leads, industrial business owners

What It's For:
Many industrial firms operate with vague handshake deals or outdated terms with distributors. This template helps formalize your partnerships with clarity, protecting your margins, brand, and market access while motivating performance.

This is intended as a guide only. This is not legal advise. All agreements should be vetted by your legal counsel before use.

DISTRIBUTOR PARTNERSHIP AGREEMENT TEMPLATE

SECTION 1: PARTIES AND PURPOSE

This agreement is made between [Manufacturer] and [Distributor], with the goal of establishing a partnership to distribute, promote, and sell [Product Line] within the defined territory.

✅ Include legal names, primary contacts, effective date

SECTION 2: TERRITORY & EXCLUSIVITY

Clause	Option A (Exclusive)	Option B (Non-Exclusive)
Territory	Defined by region, zip, country	Same
Exclusivity	Sole rights in region	Manufacturer may appoint others

✳️ **Tip: Always time-bound exclusivity (e.g., 12 months, performance-based)**

SECTION 3: PRODUCT RANGE & PRICING

- Full list of SKUs included
- Wholesale pricing tiers
- Minimum order quantities (MOQs)
- Volume discounts (tiered or quarterly)
- Suggested retail price (optional)

✅ Clause: Manufacturer reserves right to update pricing with 30-day notice

SECTION 4: SALES & MARKETING EXPECTATIONS

- Quarterly sales targets
- Reporting cadence (monthly/quarterly reports)
- Distributor to carry promotional inventory or demo units
- Branding guidelines for catalogues, events, and web listings
- Manufacturer to provide updated assets every 6 months

✳️ Optional: Co-marketing fund or MDF clause (e.g., 3–5% rebate to be used for events or campaigns)

SECTION 5: TERMS OF PAYMENT & FULFILMENT

Clause	Notes
Payment Terms	Net 30 standard, discounts for early pay
Delivery Timeline	Orders shipped within X business days
Shipping Responsibility	FOB Origin / Destination
Returns Policy	Defective only / restock fee for undamaged

SECTION 6: BRAND & TERRITORY PROTECTION

- Non-compete clause: Cannot promote direct competitors in same product class
- Confidentiality agreement (pricing, roadmap, supply info)
- Inventory and sales audit rights
- Termination clause: Cause and no-cause with notice period
- Renewal clause: Automatic renewal with performance check-in

SECTION 7: SIGNATURE BLOCK

Signed and agreed to by both parties as of [DATE]:

[Manufacturer Name]
Name, Title, Signature

[Distributor Name]
Name, Title, Signature

⭐ **Pro Tip:**

Use this template to **as a guideline for kicking off every new distributor relationship**, and review existing agreements annually. Clear rules make great partners, and help avoid future margin-killing ambiguity.

This guide is not legal advice. All agreements should be vetted by your legal counsel.

WHAT'S NEXT?

If you found this toolkit valuable, here are three ways to go further:

1. Book a Strategy Call:

Let's map these frameworks directly to your current challenge.
Book Your Call Here

2. Download Another Toolkit:

Explore toolkits for sales, leadership, persuasion, and negotiation.
🌐 See our Tool Kit Library HERE

3. Subscribe to the Drip Series:

Get deeper behavioural strategies, templates, and case studies, delivered in 5-minute reads.
👉 The opt-in is at the bottom of THIS PAGE

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Reilly Sales Consulting (RSC)

"Where closing psychology meets bulletproof sales systems."

Reilly Sales Consulting helps B2B sales teams close faster, with less friction, and greater predictability.
We install frameworks rooted in behavioural science that unlock complex buying groups, surface hidden objections early, and engineer decision-making confidence, without the pressure tactics that buyers resist.
Whether you're scaling SaaS, professional services, industrial manufacturing, or founder-led growth, RSC gives your team the psychology-driven edge to win faster, bigger, and more often.

Limbinic Consulting

"The Science of Influence for High-Stakes Professionals."

Limbinic empowers leaders in law, consulting, financial services, and other high-stakes industries to master the art and science of influence.
Our frameworks combine cognitive science, courtroom persuasion tactics, and elite-level strategic communication to help you shape outcomes where stakes, and scrutiny, are highest.
From closing multi-million-dollar contracts to winning high-risk negotiations, Limbinic gives you the tools to influence like a superpower.