

THE PLAYBOOK

5 Steps To Turn Field Sales Data Into Intel That Moves the Bottom Line

The best field sales leaders don't simply manage the number. They build a system that helps their teams produce it.

They start with a clear game plan for which accounts matter most, who should be seen, when they should be seen and why. They use data to help reps make better decisions in the field. They also coach the behaviors that drive results and give reps tools that make the right actions easier to execute. Most importantly, they can see what's happening in the field, understand the results those efforts produce, and use what they learn to continuously improve the sales organization.

This playbook is built from real conversations with field sales executives who are putting these principles into practice.

THE CHALLENGE:

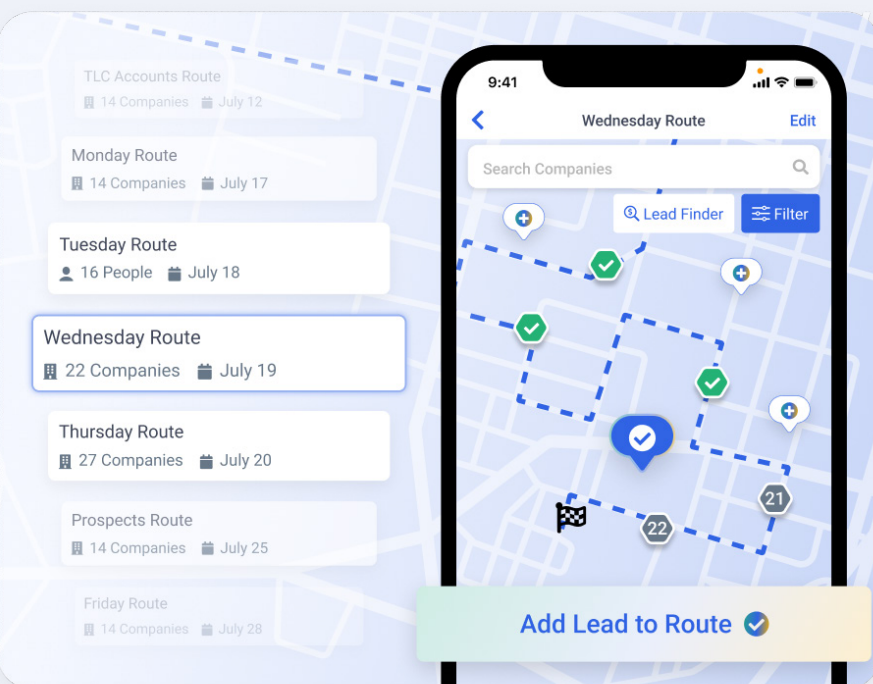
Turning Field Sales Actions Into Revenue Intelligence

Field sales organizations invest heavily in their field sales teams because that's where most of their top-line revenue comes from. Understanding how those teams spend their time is essential to realizing the full value of that investment. Yet without precise data showing which sales actions drive revenue, those investments have largely been based on data that offers an incomplete picture of the organization's field performance.

Sales leaders can't measure what they can't see. And reps can't meet benchmarks if they can't see their own

progress. To fully understand how individual reps, teams, and the entire organization are faring in the field, companies need a way to make sense of all the data they are collecting.

The impact is profound. Companies with field sales teams can move activity inputs past the "data" stage, turning them into signals that, combined with CRM-based insights, become intelligence that helps organizations find and capitalize on revenue opportunities.



How companies with field sales teams can turn data into action:



Reps input field activity



Field activity becomes data



AI software finds patterns and surfaces signals from the data



The entire company use those signals to make decisions that grow revenue

Here's what that looks like across the sales organization:

- 1 **Field Reps** can monitor customers' revenue cycles and get alerts when customer actions indicate revenue may be at risk, so they can intervene proactively.

IMPACT

Orders are down 10% on a reminder-based sale. A field rep gets this intelligence and can act right away with a visit to get back on the customers' radar, rather than waiting for their next planned touchpoint, which may be too late.

- 2 **Sales Managers** have a single source of truth that shows a rep's actions and where additional coaching is needed to keep customers engaged.

IMPACT

The dynamic in one-on-one coaching sessions shifts. Instead of asking a rep to explain actions they've already logged, the manager can review those actions ahead of time to see, at a glance, whether and how the rep is executing the plan. Then, managers can coach reps on next steps based on where the data indicates more action is needed and what behaviors the data shows top reps use to drive results.

- 3 **Executives** can better understand whether they've identified their total addressable market and how much of it their team has covered. This helps reduce turnover and avoid over-hiring.

IMPACT

A company's top field rep may generate \$7 million in their territory annually. Can leadership say, with confidence, that \$7 million is the ceiling for that territory and not \$10 million, \$14 million, or more? When execs know a territory's potential, they can confidently invest the right resources to reach it.

The best field sales leaders use strategy to point reps in the right direction, data to improve decisions, coaching to optimize performance, and technology to simplify execution.

“

It's absolutely important that we're not just glorified order-takers, but that we're truly a business coach and a partner. I attribute part of my team's success to developing data-driven processes that help reps stay organized, execute their plan, and build out their upcoming week effectively.”

Chris Zink,
Director of Sales,
Sanders Supply, Inc.



THE FIVE PLAYS

PLAY #1

Build the Territory Game Plan

Setting up a territory game plan requires identifying top-priority accounts, segmenting by opportunity, and establishing the right coverage and visit cadence through these four actions:

Define the territory opportunity.

Understand the market potential within each territory, including customers, prospects, revenue opportunity, whitespace, and growth potential.

Match coverage to opportunity.

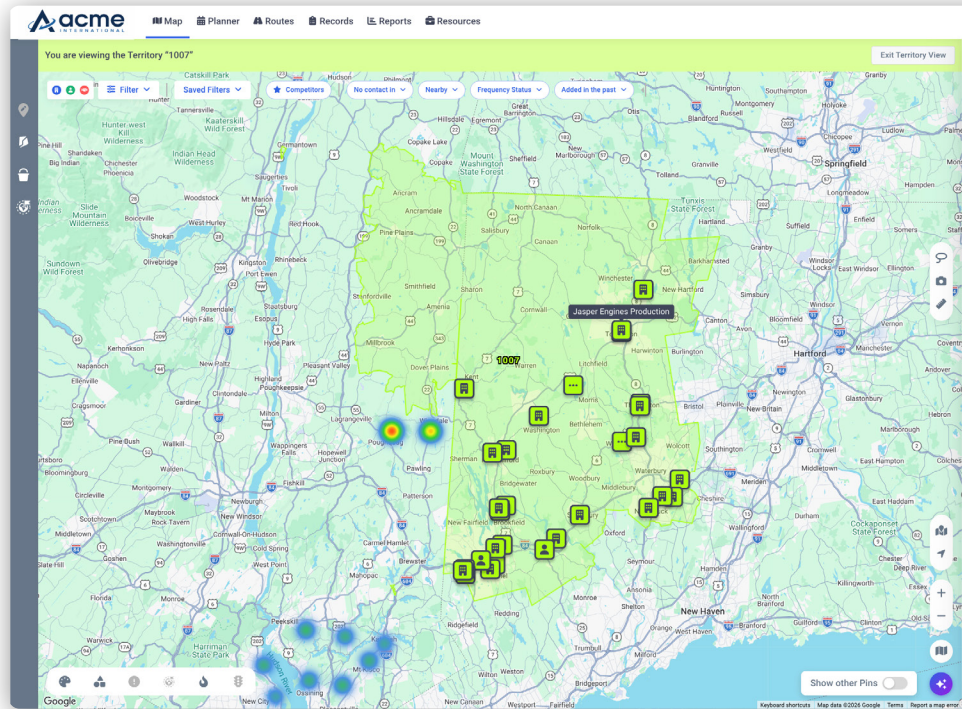
Establish the appropriate visit cadence by account tier. High-potential accounts receive greater attention, while lower-potential accounts are covered more efficiently.

Balance territories and resources.

Make sure account assignments, opportunity, geography, and rep capacity create territories that can realistically be covered and won. Identify and reassess high-effort, low-revenue territories.

Make the game plan visible.

Give reps a clear view of their priority accounts, coverage expectations, and territory so they know where leadership expects them to invest their time.



THE FIVE PLAYS

PLAY #2

Turn Strategy Into Daily Action

Field conditions change constantly, making it essential to help reps know who needs attention today based on account priority, buying behavior, recent activity, and opportunity through these five actions:

Know who to see next.

Use activity, revenue, buying patterns, account priorities, and recent changes to identify which customers and prospects deserve attention now.

Identify over-invested accounts.

Find accounts receiving significant rep time without corresponding revenue or growth and determine whether to redirect that time.

Surface cross-selling opportunities.

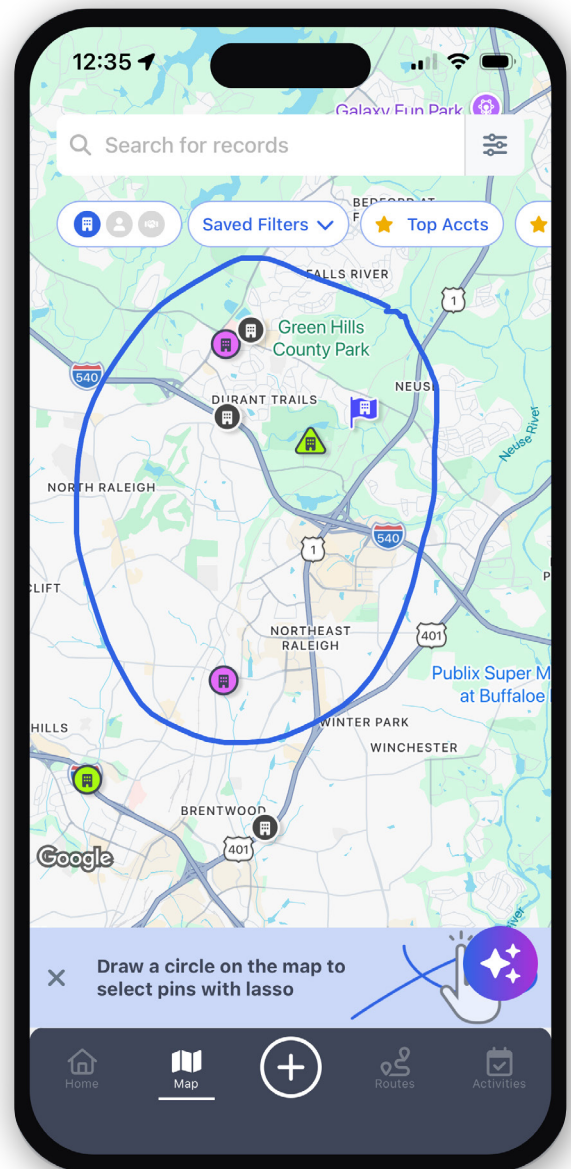
Show reps which customers have untapped product or category potential so they walk into the account prepared to discuss logical expansion areas.

Identify risk before revenue disappears.

Declining activity combined with declining orders may signal an account that needs attention before it becomes a lost customer.

Adjust the field plan.

Use current account, activity, and revenue signals to redirect rep time as conditions change, keeping daily execution aligned with the strategic territory game plan.



THE FIVE PLAYS

PLAY #3

Make Execution Easier for Reps

Software shouldn't feel like extra homework for your team. It should make a rep's day easier – helping them figure out who to visit, the best way to get there, and how to spend less time filling out reports. Here are four ways to make that happen:

Give reps something valuable in return.

The platform doesn't just collect information from reps. It gives them intelligence that helps them manage their territories, prioritize accounts, and uncover opportunities.

Plan the day in one place.

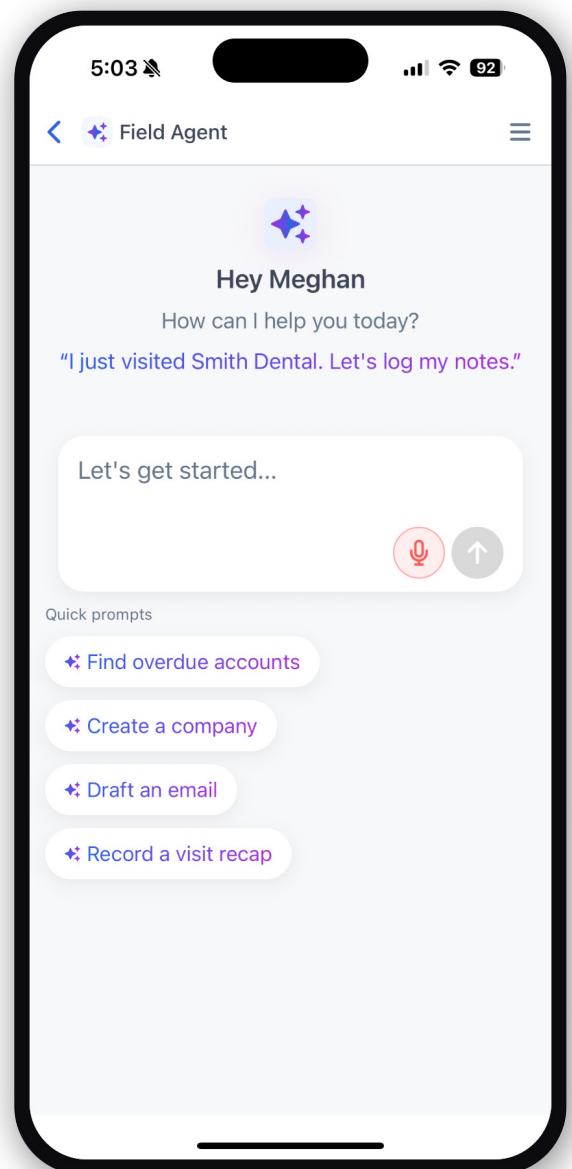
Accounts, contacts, routing, visit history, priorities, and check-ins come together in one mobile experience built around how field reps actually work.

Make activity capture part of selling.

When documenting activity is fast and naturally integrated into the workflow, reps spend less time entering data and more time with customers.

Create better data through better adoption.

When reps use the platform because it helps them do their job, leaders get more complete field data, increasing visibility and enabling better decision-making.



THE FIVE PLAYS

PLAY #4

Coach Behavior, Not Just Outcomes

Don't wait for a missed quota. Identify execution gaps early and coach the specific behaviors that need to change by focusing on four core areas:

Identify reps' roadblocks.

Use field activity, account progression, and performance patterns to identify where individual reps consistently stall and where coaching can have the greatest impact.

Coach in the context of the account.

Use account history, activity, opportunities, and customer interactions to make coaching specific and actionable.

Turn coaching into accountability.

Document what was discussed, what the rep committed to do, and what happened next. Coaching becomes an ongoing improvement process rather than a conversation that disappears after the meeting.

Surface coaching moments earlier.

Continuous signals help leaders identify emerging patterns and intervene before they become missed opportunities or missed quota.

The screenshot shows a CRM interface for a user named Eric Yang. The dashboard includes tabs for Dashboard, Timeline, Field Insights (selected), Coaching, and Tasks. The Field Insights section displays a Weekly Executive Summary generated from activity notes, record notes, and check-in data. The summary is divided into four main sections: Opportunities & Buying Signals, Risks & Red Flags, Key Themes, and Suggested Actions.

Weekly Executive Summary
Generated by analyzing activity notes, record notes, and check-in data from your team.

Opportunities & Buying Signals
Falcon Dynamics showed strong growth potential, having completed six units in just six months and actively engaged with the portal. Orbit International demonstrated clear adoption momentum, with Ryan actively pushing his team to sell more products and requesting a turbo quote during a portal demo. Glacier Holdings expressed interest in our transfer warranty and received a quote, while Helios Pharma had multiple conversations with mechanics and explicitly stated their intent to continue pursuing our solutions. Sunridge Group is excited about gas turbo options and is actively seeking to move away from junkyard engines, though owner buy-in remains pending.

Risks & Red Flags
Meridian Trading is deemed "dead," with no recent heavy work and focus on unrelated projects. Anvil Trading and another company both report no heavy jobs since last year, with confusion over product offerings. Bedrock Outfitters and another company report minimal heavy activity despite engagement. Sterling Exports appears out of business. Mojave has halted operations due to construction, and its counterpart Mojave Insurance has sold the business. Evergreen has empty parking and may drop off entirely.

Key Themes
The 62TE and 6L80/90 transmissions are the most frequently discussed products across accounts. Warranty reimbursement issues and core charge disputes are recurring pain points, mentioned at Shenandoah Agriculture, Sandstone Diagnostics, and Riverdale Enterprises. Many accounts are shifting to junkyard or used parts due to cost pressures, with explicit mentions from Sunridge Group, Helios Pharma, and Helix Bakery. Portal adoption and training are increasingly common touchpoints, particularly with Falcon Dynamics and Orbit International.

Suggested Actions
1. Follow up with Falcon Dynamics to offer a dedicated onboarding session for their growing team and explore future opportunities based on their six-unit track record.

THE FIVE PLAYS

PLAY #5

Build a Stronger Sales Organization

Scaling a field sales team requires turning individual daily actions into company-wide knowledge. Here are four ways to build that foundation:

Turn field knowledge into company knowledge.

Every customer interaction, contact, note, opportunity, and account insight becomes part of the organization and not something that lives in a rep's spreadsheet, inbox, notebook, or memory.

Learn what works and repeat it.

Connect activity, account coverage, and revenue outcomes to identify the behaviors and field actions producing results. Use these insights to improve how the entire team sells.

Protect customer relationships.

When territories change or reps leave, customer history and open opportunities remain intact. The next rep doesn't have to start the relationship from scratch.

Continuously improve the game plan.

What leaders learn from the field feeds back into account prioritization, coverage, coaching, and execution. This makes the next decision better than the last.

“

I can see specific reps, where they're getting stalled. If they can't get past that consistently, we're really good at focusing on where the problem is.”

Kevin Dunbrack,
COO, McCarthy & Sons



PROOF POINT:

What This Looks Like at Scale

Jasper Engines & Transmissions has put these principles into practice across a field sales organization of 160+ reps, using Map My Customers.

Platform usage contributed directly to increased sales. The visibility the platform provided also helped managers identify top-performer behaviors most closely linked to revenue growth and build those tactics into their coaching strategy for the entire team.

That's how revenue-driving behavior scales and how leaders can build a game plan that bolsters the bottom line.

32K+

field activities
logged monthly

90%+

rep adoption
across
the team

160

field reps
executing in
one platform

CONCLUSION

The shift toward real-time field visibility is fundamentally changing how sales organizations operate. When field teams replace manual guesswork with clear activity signals, sales leaders gain the insight needed to optimize territories, support reps effectively, and scale revenue.

Ultimately, turning daily field activity into organizational knowledge isn't just an operational improvement, it's how modern field sales teams build a sustainable, long-term competitive advantage.

“

Map My Customers gave us the visibility we never had. Now we know what's happening in the field, every day and the results those efforts produce.”

Joe McDonald,
Executive Vice President of Sales,
Jasper Engines & Transmissions

