ALLIANCE CONSUMER GROUP

Account Manager Playbook

INDEPENDENT RETAIL EDITION | 2025

OUR PURPOSE

To craft authentic products that enhance adventures and everyday life.

OUR VISION

To build iconic brands that consumers believe in, customers trust, and team members are proud of.

OUR VALUES

Accountable
We do what we say we'll do.

Collaborative
We're stronger together.

Trustworthy
We have each other's backs.

SECTION 01

Role Overview & Expectations

As an Account Manager at Alliance Consumer Group, you are the single point of contact for your assigned accounts across a network of independent, owner-operated retailers — hardware stores, outdoor and sporting goods shops, auto parts stores, gift and general stores, convenience stores, and farm and feed suppliers.

Your job is not just placing orders. You are building relationships, surfacing opportunities, and positioning ACG brands for long-term growth at retail, one store owner at a time.

Core Responsibilities

- Manage and grow a defined book of independent retail accounts through consistent outbound calling and relationship development
- Represent all ACG brand lines — TRUE, NEBO, THAW, HALO, iPROTEC, and Skeeter Hawk — in every account conversation
- Identify and act on sales opportunities using account data, seasonal context, and the DSR tool
- Handle owner objections professionally and with strong product knowledge
- Document call outcomes and maintain accurate records in Salesforce
- Collaborate across the team to share account insights and best practices

What Success Looks Like

CONSISTENCY

Hit your daily call targets and follow a structured call cadence across your full book.

RELIABILITY

Come prepared. Know your accounts, the DSR, and your product lines before every call.

OWNERSHIP

You own your accounts. When something goes right or wrong, it starts and ends with you.

Quota & Performance

- Quota attainment at or above 100% consistently
- Strong call-to-order conversion — every call should have a clear ask
- Accounts that grow over time, not just maintain

- Store owners who look forward to hearing from you because you bring value, not just pitches

SECTION 02

Salesforce Setup – Sorting Your Book & Cadences

Before you make a single call, get your book organized in Salesforce and every account enrolled in the correct cadence. This is your foundation. Do not skip it.

Understanding the Tier Structure

Every account falls into one of three tiers based on brand engagement, order frequency, and store type. The tier determines cadence, contact frequency, and the value-add benefits you can offer.

TIER	BRAND ENGAGEMENT	ORDER FREQUENCY	MIN CONTACT	FIRST OUTREACH
Platinum	All product lines + full store presence	Monthly	Bi-Weekly	Within 24 hours
Gold	2+ product lines + strong presence	Every 1-2 months	Monthly	Within 2 business days
Silver	1-2 product lines	Quarterly	Quarterly	Within 3 business days

Tier Benefits – Know These Cold

These benefits are your most powerful tool during transition conversations. They show the store owner this relationship is getting better, not just different.

PLATINUM

Annual Business Review · Loyalty Incentives · Early Access to New Products · Free Freight · No Handling Fee · Quarterly Product Sampling · Exclusive Training Events · ACG Consumer Advisory Board

GOLD

Annual Business Review · Special Promotional Offers · Loyalty Incentives · No Handling Fee · Bi-Annual Product Sampling · Exclusive Training Events · ACG Consumer Advisory Board

SILVER

Engagement Nudge Communications · Special Promotional Cross-Sell/Upsell Offers

Sorting and Assigning Cadences – Step by Step

Work through your book three times in this exact order. Complete one tier fully before moving to the next.

ROUND: PLATINUM ACCOUNTS

1. Navigate to your Account list view. Filter by Tier = Platinum.
2. Review the AI Account Summary for each account — note risk signals, open escalations, and opportunities.
3. Add each account to the "Platinum Customer Happy Cadence" in the Cadence section of the account record.
4. Check for an existing DSR on each account. Open and review it so you are ready to position it on your first call.
5. Repeat until every account in this tier is enrolled.

ROUND: GOLD ACCOUNTS

Follow the same five steps above, filtering for Tier = Gold and enrolling in the "Gold Customer Happy Cadence."

ROUND: SILVER ACCOUNTS

Follow the same five steps above, filtering for Tier = Silver and enrolling in the "Silver Customer Happy Cadence."

CHECKPOINT BEFORE MOVING ON

- Every account in your book should be enrolled in exactly one cadence.
- No account should be sitting without a cadence assigned.
- If you find an account without a cadence, assign it before making any calls.

SECTION 03

The One-Rep Model

ACG operates on a one-rep model. Every account has a single point of contact — you — for all brands and product lines. Store owners no longer receive separate calls from different reps. You carry the full ACG portfolio into every conversation.

The Mindset Shift

- You are not a NEBO rep or a TRUE rep. You are an ACG rep.
- Your value is the ability to see each account's full assortment opportunity across all brands.
- A slow line is not a dead end — it is an opening to introduce something fresh and rebuild momentum.
- One strong SKU introduction can generate attention that lifts an entire line.
- Your role extends beyond taking orders. You are a dedicated advocate, multi-brand ambassador, and strategic partner to a store owner who is often running the business themselves.

How to Structure the One-Rep Call

A one-rep call does not mean covering every brand every time. Come in with a plan, lead with your strongest opportunity (informed by the DSR), and bring in other brands naturally where the conversation supports it.

Open	Establish context. Remind the owner they have one dedicated contact for all ACG lines.
Lead	Anchor the call around your primary opportunity. Use the DSR to sharpen your pitch.
Listen	Let the owner respond. Their objections and questions reveal the real opportunity.
Expand	Where natural, layer in a second brand or SKU that complements the conversation.
Close	Always make a specific ask. A call without an order attempt is a missed opportunity.

VALUE STATEMENT

"I'm here as your partner to help you grow your business. I represent the full ACG brand portfolio, and my job is to bring you the insights, merchandising support, and strategic guidance you need to compete and win. You don't have to figure it out alone. That's what I'm here for."

SECTION 04

Pre-Call Checklist

Complete these steps before every call. This takes 5 to 10 minutes and is the difference between sounding like a stranger and sounding like a partner — something that matters even more with an independent owner who remembers who calls them and who doesn't.

1. Pull up the AI Account Summary. Read it in full. Note key themes, relationship history, product usage patterns, and any risk indicators.

2. Check for an active DSR. Open it. Understand the recommended product, the rationale, and the account's purchasing history. Be ready to reference it naturally.

3. Review recent Salesforce activity. Look at the last 5 to 10 logged activities — calls, emails, meetings, support cases. Know the owner's recent experience.

4. Confirm the account tier and benefits. Platinum, Gold, or Silver? Know exactly which value-adds apply and be ready to reference them conversationally.

5. Identify the decision maker. In most independent stores, this is the owner directly — but confirm whether a partner or spouse is also involved in buying decisions.

6. Prepare your lead opportunity. What is your primary ask for this call? Have a specific product, quantity, and rationale ready before you dial.

SECTION 05

DSR – Data-Driven Selling Recommendations

The DSR (Directed Sales Recommendation) is loaded on every account in Salesforce. It combines account purchase history, product gap analysis, and AI-powered demand signals to surface a specific product recommendation for each call. It tells you what that account is most likely ready to buy — right now.

What the DSR Shows You

- Recommended product and SKU with full description
- Recommendation rationale — why this product for this account, based on comparable accounts and purchasing patterns
- Gap Source (e.g., DemandRX) and Product Category Gap (e.g., POCKET, FLASHLIGHT)
- Ranking score and strategy (e.g., Spend-based)
- A ready-to-use voicemail script, call script, and email — all pre-written for you
- Status field for you to disposition after the call: Open, Deferred, Neglected, Completed, or Rejected

Working the DSR – Step by Step

1. Open the account in Salesforce and navigate to the Directed Sales tab.
2. If a DSR is listed under Directed Sales Recommendations, click the link to open it and review the full recommendation.
3. If no active DSR exists, click Create Sales Recommendation in the top right. Then click Create and Finish. The system will generate a recommendation and populate it automatically.
4. Review the recommended product, rationale, pitch scripts, and email template before your call.
5. After the selling conversation, update the Status field at the top of the DSR record to reflect the outcome.

DSR Status Definitions

- **Open** — Active recommendation, not yet actioned

- **Completed** — Conversation happened and the product was sold or seriously considered
- **Deferred** — Owner interested but not ready — revisit on the next call
- **Rejected** — Owner declined; note the reason so the system can learn
- **Neglected** — Call was made but the DSR was not addressed

WHEN YOU HIT AN ERROR

Occasionally the system will return an error: *"Unable to create a Sales Recommendation: No matching products found in lookalike accounts."* This is normal. The AI is still learning your book.

IF YOU SEE THIS ERROR:

- Click Finish — do not try to recreate the DSR immediately.
- Use the AI Account Summary on the right panel to guide your conversation.
- Enroll the account in the appropriate cadence and continue the call as planned.
- Trust the process. Every interaction feeds the system and improves future recommendations.

Using the DSR Alongside Your Account Knowledge

The DSR is a data-informed lens, not a replacement for your judgment. The best reps use it to sharpen their pitch, then layer in what they know about the store owner. If the DSR conflicts with your read, use both — pitch the recommendation and explain your own insight. If you override a DSR, know why.

SAMPLE DSR PITCH

"Before I get into the main reason for my call, I was looking at your account and I think there's a real opportunity with [DSR product]. Based on what I'm seeing, it fits well with what your store has been moving. I'd love to tell you a bit more and see if it makes sense for you."

When the Owner Pushes Back

"That line is slow for us"	Acknowledge it, ask what has been moving, and look for a fresh SKU to reset the owner's perception. A new item in a slow line can change the conversation entirely.
"We're overstocked right now"	Shift to a future-forward conversation. Ask about their next order window and position the DSR product for that timing.
"We already carry that"	Dig into velocity. If they carry it but it is not moving, the conversation becomes about execution — placement, signage, or a seasonal tie-in.

SECTION 06

Opportunities & Order Workflow

When a store owner expresses interest in a product or you identify a clear sales opportunity, log it as an Opportunity in Salesforce. This tracks your pipeline, ties to the order workflow, and keeps your book organized. Here is the full process from opportunity to submitted order.

Creating an Opportunity

1. From the account record, click the Related tab and locate the Opportunities section. Click New Opportunity.
2. Enter an Opportunity Name and Close Date, then click Save.
3. The opportunity record will open. Click Manage Products in the top right to add the products the owner is interested in.
4. After adding products, click Update Opportunity. Work through and mark all stages as Complete.
5. If you are not ready to convert to an order yet, leave it as an Opportunity and return when you are ready.

Converting an Opportunity to an Order

1. From inside the Opportunity record, click the down arrow in the bottom right and select New Quote.
2. Fill out the Quote Name and click Save.
3. Click Start Sync. This will sync the opportunity products with the quote line items. Confirm by clicking Continue on the Sync Quote prompt.
4. Navigate back to the Account page using the top left tab. Go to the Related tab and find the Orders section.
5. Click the top order in the list — this is the order tied to the opportunity you just created.
6. Review the order. Click Manage Products if you need to update anything before placing. Make sure the PO Number is entered.
7. Click Submit for Approval. Add any relevant comments and click Submit.

IMPORTANT REMINDERS

- Calculate Pricing is for presale only — do not use it for standard orders.
- All fees including handling and freight are already included in the Order Amount shown.
- Ensure Bill To, Ship To, Billing Method, and Payment Terms are all populated before submitting.
- The order status will move through: New > Financial Review > Order Review > Processing > Shipped > Completed.

SECTION 07

First Outreach Scripts

These scripts are for your very first touchpoint with each store owner. Adapt the tone to match the tier and the relationship, but keep the structure consistent. Remember: with an independent owner, you're often talking to the person who built the business, not a buyer several layers removed from it. Personal, direct, and respectful of their time wins here.

Introduction Email – All Tiers

Adjust the urgency of the meeting request based on tier. For Platinum, follow up within 24 hours by phone if you don't hear back. For Gold, wait 48 hours. For Silver, a second email on day 3 is sufficient.

EMAIL — SUBJECT: YOUR NEW POINT OF CONTACT AT ACG

"Hi [First Name], I wanted to reach out personally to introduce myself. My name is [Your Name] and I'm your dedicated Account Manager going forward. I know transitions can feel disruptive, especially for a shop where you're wearing every hat, so I want to make this as seamless as possible. I've already reviewed your account and my priority is making sure nothing falls through the cracks. I'd love to set up a quick 15-minute call this week to hear directly from you about what's working well and where I can help. Would [Day/Time] or [Day/Time] work?"

Introduction Call – Live Answer

LIVE CALL

"Hi [First Name], this is [Your Name] from ACG. I sent you an email introducing myself as your new Account Manager and wanted to put a voice to the name. I've already familiarized myself with your account and want to make sure this transition is completely seamless for you. What does your calendar look like this week?"

Introduction Call – Voicemail

Keep under 30 seconds, say your number twice.

VOICEMAIL

"Hi [First Name], this is [Your Name] from ACG. I'm your new Account Manager and wanted to introduce myself. I sent you an email with my contact info but also wanted to leave my direct number: [number]. I'd love to find 15 minutes to connect and make sure this transition is smooth for you. Looking forward to talking soon – [number]."

SECTION 08

Encounter Scenarios

These are the real situations you will face during account transitions with independent store owners. Each scenario includes the core message, how to deliver it, and what to avoid.

"What happened to my rep?"

This is the most common question you will hear. Be direct and pivot quickly to what you are doing to take care of them.

WHAT TO SAY

"Our team has been reorganized to make sure every store gets the right level of attention, and your account has been assigned to me. I've already reviewed your history and any open items, so we can keep things moving without missing a beat." *Be matter-of-fact. Don't linger on the departure or offer personal opinions.*

NEVER SAY

- "They were let go."
- "There were some performance issues."
- "Between you and me..."

"I had a great relationship with my old rep."

The owner is expressing loss. Lead with empathy before redirecting to your commitment.

WHAT TO SAY

"I completely understand your frustration. Building a strong working relationship takes time and I respect what you had. I'm not going to pretend I can replace that overnight, but I will earn your trust the same way — by showing up prepared and following through on what I say I'll do." *Slow down. Lower your energy slightly. Let them vent, then redirect.*

NEVER SAY

- "I know how you feel."
- "Don't worry, I'm even better!"
- "You'll forget about them in no time."

"Do I have to re-explain everything?"

Shut this down immediately with proof you have done your homework. Be specific.

WHAT TO SAY

"No, you won't. I've already gone through your full account history and reviewed your past purchase history. I know your current setup and the open items on your account. You are not starting from scratch." *Reference one or two actual details from the account. Specificity builds instant credibility.*

NEVER SAY

- "I'll need you to catch me up on a few things."
- "I haven't had a chance to review everything yet."

"Is the company stable?"

The owner is evaluating risk. Project calm confidence without overselling.

WHAT TO SAY

"That's a fair question and I appreciate you asking directly. The company is in a strong position and investing in our customer relationships is a top priority. My role exists specifically to make sure store owners like you get the dedicated attention you deserve. I'm happy to connect you with leadership if you'd like to hear it directly from them." *Stay steady. Don't get defensive.*

NEVER SAY

- "Oh, everything is fine!"
- "We've had some restructuring but..."
- "I wouldn't worry about it."

"I want to talk to your manager."

Don't take it personally. Make it happen quickly and gracefully.

WHAT TO SAY

"Absolutely — I think that's a great idea. I want you to feel completely supported. Let me connect you with [Manager Name] today and make sure they have full context on your account. Is there anything specific you'd like to discuss so I can make sure they're prepared?" *Respond immediately and positively. Loop your manager the same day.*

NEVER SAY

- "Can I ask why?"
- "I should be able to handle whatever you need."
- "My manager is pretty busy, but I'll try."

Owner mentions a competitor

This is a signal, not a decision. Lean into their tier benefits and create urgency for a deeper value conversation.

WHAT TO SAY

"I appreciate you sharing that. Before you spend time evaluating alternatives, I want to make sure you are getting the full value of your ACG partnership. You have [tier-specific benefits]. Can we schedule a deeper conversation this week so I can walk through how your current setup aligns with your goals?" *Stay calm and curious. Flag the account to your manager as at-risk after the call.*

NEVER SAY

- "They can't do what we do."
- "Their product is terrible."
- "We can match their pricing."

Owner has an open support issue

If you spot an unresolved issue in your pre-call prep, lead with it. Do not wait for them to bring it up.

WHAT TO SAY

"Before we get into anything else, I want to acknowledge that I saw you have an open [support case / escalation] around [brief description]. I've already connected with our support team to get the latest status and I'm going to personally track this to resolution. I don't want this hanging over our relationship." *Leading with this is one of the fastest ways to build trust.*

NEVER SAY

- "That was before my time."
- "You'll need to work with support on that."

Owner asks for a discount

Transitions are when store owners test pricing. Redirect, don't reject. Never negotiate on the spot.

WHAT TO SAY

"I hear you. Let's first have a proper conversation about the value you're getting from ACG today and whether there are ways I can help you get more out of your investment. Once I have a full picture of your needs and goals, I'll be in a much better position to have a productive conversation about your terms." *You are saying 'not yet, and not without context.'*

NEVER SAY

- "I can't do anything about pricing."
- "Let me see what I can do."
- "The previous rep should never have given you that rate."

SECTION 09

Escalation Guide

Not every situation can be handled solo. Escalate the same day in any of these scenarios. Waiting makes it worse.

Owner says they plan to cancel	Notify your RSM immediately with a summary of the situation, what you have already done, and your recommended next step.
Platinum account unresponsive after 3+ attempts	Escalate to your manager for potential executive-to-owner outreach.
Owner demands executive contact and is visibly upset	Make it happen the same day. Brief your manager before connecting them.
Major unresolved issue discovered	Billing disputes, broken SLAs, or product issues — you own the relationship, not just the easy parts.
Competitor is actively engaged	Flag the account as at-risk immediately. Consider bumping it to Platinum if it isn't already.
Negative feedback that feels beyond normal frustration	Loop in your manager the same day with a full summary.

Escalation Path

- Notify your RSM the same day with: a summary of the situation, what you have already done, and your recommended next step.
- For Platinum accounts with imminent risk, request Director-level outreach.
- Document everything in Salesforce before escalating so your manager has full context.

Quick Reference – Scenario Cheat Sheet

SCENARIO	YOUR CORE MESSAGE
"What happened to my rep?"	Our team reorganized to ensure the right level of attention. I've already reviewed your account.
"I'm frustrated about this."	I respect what you had. I'll earn your trust the same way — by showing up prepared.
"Do I have to re-explain everything?"	No. I've reviewed your full account history. You are not starting from scratch.
"Is the company stable?"	We are in a strong position. I'm happy to connect you with leadership directly.
"I want your manager."	Absolutely. I'll set that up today and make sure they have full context.
Competitor mentioned	Lean into tier benefits. Schedule a deeper value conversation. Flag as at-risk.
Account unresponsive	Send a soft-close email. Shift to value-drip cadence. Escalate Platinum accounts.
Open support issue	Lead with it. "I saw the open case. Here's the status. I'm tracking it personally."
Discount request	Redirect to a value conversation first. Come back with a strategic response.

Transitions are uncomfortable for independent store owners, but they are also an opportunity to raise the bar. The reps who win are the ones who show up prepared, lead with empathy, deliver value fast, and never make the owner feel like they are starting over. Sort your book. Assign your cadences. Review your DSRs. Then pick up the phone and earn their trust.