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Best Practices: Training development for Manufacturer's Reps

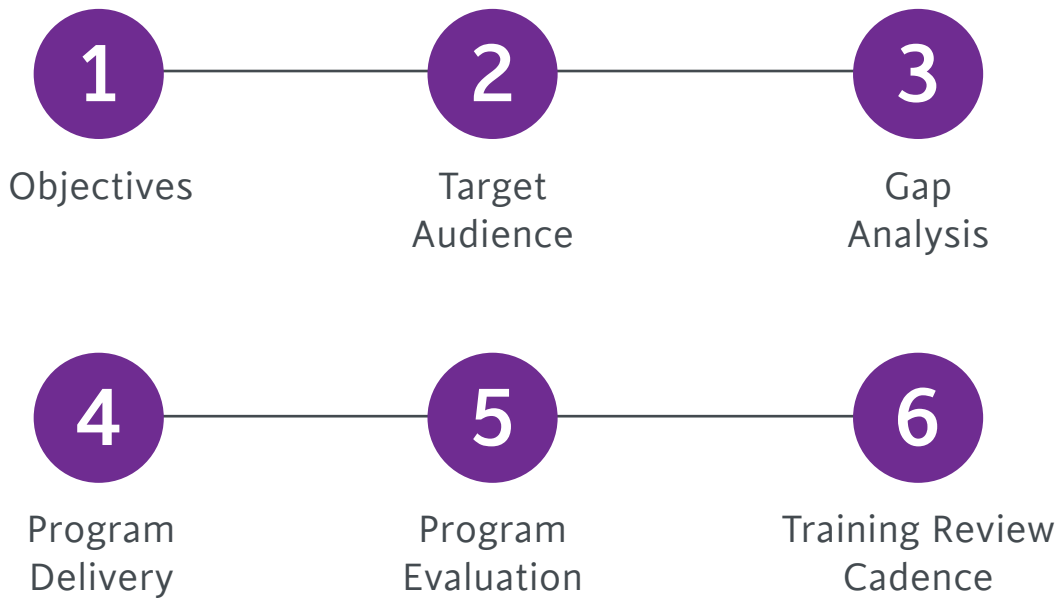


EFC
CEMRA - CMG

EFC Training Best Practice for Manufacturer's Reps

The EFC training best practice is designed to support the Annual Planning process between manufacturers and their agency representatives. This 6 step process provides a template for manufacturers and their agency principals to identify and develop training programs. The template is flexible to facilitate a variety of roles, products and markets. The final design and execution of the training plan will be a shared responsibility between all parties.

6 step Training Plan Process



1

Training Objectives

Document the goals for the rep and manufacturer in the territory.
Refer to the Annual Joint plan to identify relevant objectives.

- Is this a new rep requiring a full onboarding and training program?
- Are there new products or markets requiring attention or expanded penetration?
- Are there new employees in the agency requiring training?
- What problems are occurring in the territory?
- What are this year's business objectives for the territory?
- Do any of the goals require a change in behaviour?
- Which roles are important to achieving the objectives?

2

Training Target Audience

To determine the target audience of your training program(s). You must confirm the overall objectives and identify the roles within the manufacturer's rep agency and complete a gap analysis. Each agency and role will have different requirements.

Sample Roles

- Customer Service
- Project Management
- Quotations
- Design/Technical Support
- Outside Sales
 - End User Sales
 - Contractor Sales
 - Specification Sales
 - Distributor Sales
 - Marketing
 - Operations

3

GAP Analysis

To prepare a Gap Analysis, you need to determine the ideal desired work situation for each role, then identify the actual work situation for those employees in those roles, and the 'gap' will highlight your training requirements.

$$\begin{aligned} & \text{Ideal Work Situation} \\ - & \text{Actual Work Situation} \\ \hline = & \text{Training Needs} \end{aligned}$$

3

Identify the Ideal Work Situation: Behaviours/Knowledge/ Skills/Abilities

Identify the behaviours required of each role to facilitate success and reach your objectives. Example behaviours are listed below.

- Prospecting for new customers
- Provide product recommendations
- Provide application and design assistance
- Make presentations to customers
- Win orders
- Secure shelf space
- Problem solving

What does success look like for each role?

- What type of **KNOWLEDGE** does the role need?
 - Topics and subjects that can be used when performing work functions
- What type of **SKILLS** are required to be successful in the role?
 - Technical or manual proficiencies
- What type of **ABILITIES** are required
 - Capacity to apply knowledge and skills to perform a task

Refer to the Sample Role profiles

3 Preparing the Gap Analysis

1. Identify rep training subjects by role
2. Assess the rep agency



3 Preparing the Gap Analysis

Identify Rep Training Subjects by Role

For each role, use the supplied Training Objective spreadsheet and fill in the required knowledge and skills for the role

See Rep Training Subjects by Role Excel spreadsheet.

Training Objectives by Role																				
Role	Knowledge Requirements										Skills Requirements									
	Products	Systems	Pricing	Policies and Procedures	Marketing programs	Markets/ Industry	Customer	Application Design	Territory Planning	Competition	Selling Skills	Presentation skills	Time Management	Account management	Negotiation	Closing	Communications/ listening	Business Acumen	Problem Solving	Software skills
Customer Service	Product Assortment and basic features, Product substitutions, Good/Better/Best solutions, accessories and options	Order entry system, inventory/product availability system, tracking system, pricing system	Day to day pricing, project pricing		Program information	Basic market industry knowledge	Basic customer knowledge	NA	NA	Basic knowledge	NA	NA	Yes	NA	NA	NA	Yes	NA	Yes	NA
Outside Sales	Advanced Knowledge: Product Assortment and basic features, Product substitutions, Good/Better/Best solutions, accessories and options	Order entry system, inventory/product availability system, tracking system	Day to day pricing, project pricing		Advanced program information	Advanced market industry knowledge	Advanced customer knowledge	Basic application design	Advanced	Advanced	Advanced	Advanced	Yes	Yes	Yes	Yes	Yes	Yes	Yes	NA
Technical Support	Advanced knowledge: Product Assortment and basic features, Product substitutions, Good/Better/Best solutions, accessories and options	NA	NA	NA	NA	Advanced market industry knowledge	Basic customer knowledge	Advanced application design	NA	Advanced	Probing skills	Advanced	Yes	NA	NA	NA	yes	NA	Yes	CAD, application software

3 Preparing the Gap Analysis

Assess your Rep agency: Gap Analysis

- Using the training assessment spreadsheet, list the target employees identified for training.
- Define your scale (what does a '1' look like vs. a '5')
- Rank the employees on the knowledge and skills based on what you determined on the Rep training subjects spreadsheet
- Identify training priorities by subject and by employee

See [Rep Training Assessment Tool Excel spreadsheet](#).

Training Assessment for: ABC Agency Outside Sales														
Employee and Role		Knowledge Assessment						Skills Assessment					Prioritization	
Employee	Role	Products	Pricing	Markets/ Industry	Application Design	Territory Planning	Competition	Selling Skills	Account management	Communication skills	Problem Solving	Software Skills	Average Score	Training Priority
Jane Doe	End user/Specifier Sales	5	3	4	4	2	4	3	2	4	3	2	2.9	High
John Smith	End user/Specifier Sales	4	4	2	4	1	2	3	3	3	4	2	2.7	High
Sue Jones	End user/Specifier Sales	4	3	3	5	2	3	2	3	3	3	1	2.85	High
Mike Doe	End user/Specifier Sales	5	3	4	5	5	5	3	3	4	3	2	3.45	Medium
Prioritization	Average Score	4.5	3.25	3.25	4.5	2.5	3.5	2.75	2.75	3.5	3.25	1.75		
	Training Priority	Low	Medium	Medium	Low	High	Medium	High	High	Low	Medium	High		

What level of proficiency is the employee at with each attribute?

High priority focus subjects

High priority employees

4 Program Delivery:

Agenda & Methodology



4

Develop your Training Agenda

Your training agenda will reflect the gap analysis and the objectives derived from the annual plan. Make sure to include agenda items relevant to the skills gap and overall objectives for the territory.

Agenda items relevant to skills gap analysis

- Include priority candidates that require training
- Include priority skills/knowledge that require training.

Agenda items relevant to overall objectives for manufacturer/agency

Examples:

- Improve local technical support at agency
 - Focus on tech support roles
- Expand account base in territory
 - Prospecting skills, territory management skills
- Develop local ‘trainers’ for distributor partners
 - Train the trainer program agenda items

The training agenda must be practical and may be grouped by role or by skill/knowledge area.

- By Role:
 - Customer Service Introductory training
 - Advanced Customer Service training
- By Skill/Knowledge:
 - Selling Skills workshop
 - Application design workshop
 - Distributor trainer workshop

4

Identify your training methodology

Consider a mix of methodologies depending on the focus area

- In person: In territory/At head office
- Self directed on-line ie NEMRA University
- Live on-line

Consider the cadence of training

- 1 single session/event?
- Multiple events over time

5

Evaluate your training program

Level 1: Reaction

Measures the trainees' reaction to the training session and relevance of the program. To measure this, companies must take feedback through surveys from its employees.

Level 2: Learning

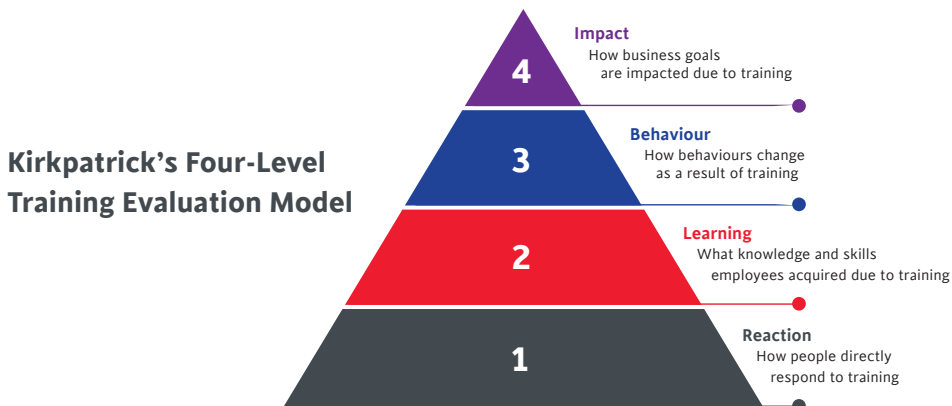
Measures the knowledge and skills gained by the learners during the training session. To measure this, companies can use test scores and feedback from the supervisor.

Level 3: Behavior

Measures how the training has impacted the employee's skills and attitudes at work. To measure this, companies need self-assessment questionnaires, focus groups, and customer surveys.

Level 4: Results

Measures the training's outcomes, in terms of cost savings, greater quality, faster project completion, enhanced productivity, staff retention, better marketing leads, increased sales and higher morale.



6

Training review cadence

Program evaluation

Agreed intervals: 30/60/90 days

Overall training plan

Integrate into business plan and review process

Sample Role Profiles

Outside Sales

Behaviours

- Effective communicator
- Consultative selling
- Territory planner
- Relationship builder
- Ability to spot opportunities
- Deal closer

Knowledge

- Expert product knowledge, technical application knowledge, pricing policies and strategies, customer profile and drivers, industry knowledge, knowledge on competition, order management systems, territory planning

Skills

- Selling skills, negotiation skills, business acumen, problem solving skills, software skills, presentation skills, time management

Abilities

- Understand customer needs, provide recommendations, selling against the competition, win orders, grow sales/pipeline, manage accounts

Channel/Distributor Sales

Behaviours

- Can drive profit for channel partners
- Builds relationships
- Business/market/merchandising planning
- Product recommendations and Inventory management for customer
- Can train distributor staff
- Can launch products and programs to staff
- Can facilitate supply chain digitization requests
- Can coordinate pricing for projects

Knowledge

- Channel partner profile and drivers, expert product knowledge, technical application knowledge, pricing policies and strategies, industry knowledge, knowledge on competition, order management systems, territory planning, merchandising tactics, marketing programs, inventory management, data and digitization tools.

Skills

- Account management skills, business acumen, selling skills, negotiation skills, problem solving skills, software skills, presentation skills, time management

Abilities

- Provide marketing and product solutions that grow channel partners top line, improves their margins and their profitability. Communicates value of relationship to channel partner. Increases shelf space for manufacturer.

Inside Sales/Customer Service

Behaviours

- Effective communicator
- Empathetic
- Problem solver
- Provide recommendations
- Attention to detail

Knowledge

- Product assortment, order management systems, pricing policies and procedures, customer profile and drivers, basic industry knowledge, knowledge on competitors.

Skills

- Communication skills, problem solving skills

Abilities

- Provide product recommendations and alternatives.
- Work with manufacturer and customer to resolve service issues
- Resolve customer complaints

Sample Role Profiles

Technical Support

Behaviours

- Probing skills to uncover needs or issues
- Full understanding of technical product and application issues
- Ability to make recommendations on products and applications
- Ability to communicate solutions to customers
- Relationship builder
- Ability to spot opportunities
- Deal closer

Knowledge

- Advanced product and application knowledge, knowledge on application design software and tools

Skills

- Probing skills, presentation skills, CAD, application software, technical designation?

Abilities

- Troubleshoot product or application issues
- Recommend products and design layouts

Marketing

Behaviours

- Customer centric approach: understand needs/drivers/pain points of customers
- Data driven decision making: utilize data to understand customer behaviour, measure campaign effectiveness, optimize strategies
- Innovation and creativity: ability to create content/programs that differentiate the company and capture target audiences
- Ability to deal with technical products/subjects
- Ability to work collaboratively with stakeholder's marketing departments
- Ability to understand sales and marketing alignment

Knowledge

- Product knowledge
- Knowledge on marketing: marketing research, marketing strategy, digital marketing, content creation, analytics and data interpretation, branding and identity, advertising and promotion

Skills

- Strong written and verbal communication skills
- Project management skills
- Software and digital skills

Abilities

- Design and manage a marketing plan based on strategic direction of agency and its manufacturers

Finance

Behaviours

- Attention to detail
- Ethical integrity
- Ability to analyse data and make business recommendations
- Ability to communicate with stakeholders
- Ability to deal with financial challenges
- Ability to collaborate with suppliers and stakeholders

Knowledge

- Accounting principles, financial analysis techniques, budgeting and forecasting, taxation, internal controls, financial reporting, regulatory compliance, erp/system skills, business acumen

Skills

- Financial analysis and accounting skills, communication skills, software and digital skills

Abilities

- Produce financial reports
- Produce business reports to facilitate decision making
- Manage commissions
- Accounts receivable and accounts payable functions
- Asset management of facilities/vehicles/equipment