BRANCH MANAGER COMPETENCY MODEL

Competencies Dealing with People

Through Selection
- Organizational Management
- Leading Change
- Listening Skills

Through Development
- Developing others
- Influencing others
- Recruitment and Selection

Competencies Dealing with Business

Through Selection
- Oral Communications and Presentation
- Skills
- Strategic Thinking
- Analytical Thinking and Decision Making
- Mechanical Aptitude
- Written Communications

Through Development
- Sales Management
- Technical & Functional Knowledge
- Branch Financial Management
KEY RESPONSIBILITIES, MAJOR TASKS AND PERFORMANCE MEASURES

KEY RESPONSIBILITY: BRANCH FINANCIAL MANAGEMENT

Managing branch assets and sales in order to achieve or exceed corporate financial benchmarks.

MAJOR TASKS

☐ Making money for the company.
☐ Developing a branch business plan.
☐ Preparing a branch budget.
☐ Forecasting sales, profitability, and costs.
☐ Controlling inventory levels.
☐ Controlling costs, i.e.: freight, expenses, supplies, salaries.
☐ Managing Receivable.
☐ Monitoring compliance with pricing policies.

PERFORMANCE MEASURES

☐ Sales Dollars
☐ Gross Profit
☐ Investment
☐ Inventory
☐ Earn-Turn Ratio
☐ Quality Impact Credits
☐ Freight Recovery
☐ Receivable
☐ Salaries and Wages
KEY RESPONSIBILITY: CREATING JUBILANT CUSTOMERS

Making our targeted customers jubilant by distributing world-class products in our selected technologies and by providing innovative total solutions that keep them competitive.

MAJOR TASKS

- Managing personal sales accounts.
- Negotiating contracts and agreement for "win-win outcomes.
- Following up to ensure that customer complaints are resolved quickly and to the customer's satisfaction.
- Communicating to customers the value documented by DVA Reports.
- Maintaining on-time and error-free service levels.
- Collecting customer feedback (QI Dialogues and other methods).
- Measuring customer satisfaction with branch service levels.
- Creating a customer-focused environment.
- Selecting competent and effective branch associates.

PERFORMANCE MEASURES

- Customer Jubilation Letters
- On-Time and Error-Free Performance Reports.
- DVA Reports
- Sales growth by customer
- Complaint Log
- Associates' Performance Appraisals

KEY RESPONSIBILITY: MANAGING ASSOCIATE PERFORMANCE

To build and maintain an efficient and effective branch staff.

MAJOR TASKS

- Recruiting and selecting Associates.
- Dealing with substance abuse problems.
- Applying Associate discipline within guidelines.
- Managing Associate performance.
- Complying with regulatory agencies.
- Responding to complaints from employees.

PERFORMANCE MEASURES

- Associate absenteeism.
- Costs of legal actions.
- Degree of compliance with OSHA and other local, state and federal regulatory agencies.
- Results of branch audits.
KEY RESPONSIBILITY: DEVELOP ASSOCIATES

Assuring that all associates are trained and developed to their fullest potential.

MAJOR TASKS

- Identifying developmental needs of overall branch and individual associates.
- Providing product and service training.
- Mentoring, coaching and teaching associates as appropriate.
- Using teamwork concepts, principles and practices to create positive environment.
- Setting expectations for all associates to work in accordance with Core Values.
- Building the sales skills of Outside Sales Associates.
- Building the operational skills of the Branch Operations Manager.
- Encouraging and supporting associates in the management of their own development.
- Giving associates assignments that will help develop their abilities.

PERFORMANCE MEASURES

- Associate productivity
- Customer feedback
- Training records
- Developmental Dialogues and/or Performance Appraisals with Associates.
- Quality Meetings
- Attrition levels
- Recognition of branch as a training ground.
- Designated as an "A" branch with certified CSSR.
KEY RESPONSIBILITY: IMPLEMENTING THE VISION

Understanding and implementing corporate strategies and philosophies and providing linkage to the branch.

MAJOR TASKS

☐ Communicating vision to branch associates.
☐ Establishing branch goals that align with the corporate strategies and philosophies.
☐ Promoting and maintaining, at the branch level, the focus of corporate strategies, such as:
  ☐ SBU Mix
  ☐ ISO Certification
  ☐ DVA
  ☐ Core Values
  ☐ Best Practices
  ☐ Cornerstones of the marketing strategy
☐ Providing constructive feedback from associates and customers to the corporate strategy champions and to one's own management.

PERFORMANCE MEASURES

☐ Implementation of Best Practices
☐ ISO Certification
☐ SBU Mix
☐ DVA Reports
☐ GAP achievement
☐ Incentive program
☐ Implementation of Cornerstone Strategies
☐ QI Dialogues
COMPETENCIES TO SELECT FOR

LISTENING SKILLS
SKILL: The ability to hear, understand and respond to oral information received from others.

OBSERVABLE BEHAVIORS:

☐ Receives complete message before reacting.
☐ Focuses on the message regardless of internal or external distractions.
☐ Recognizes patterns in the message for themes and intentions.
☐ Maintains focus on the message, not the emotions expressed.
☐ Empathizes with the speaker.
☐ Responds effectively to both the words and tone of voice (meaning behind the words).
☐ Summarizes or paraphrase what others have said to verify understanding and preventing miscommunication.

ORAL COMMUNICATIONS
SKILL: The ability to express oneself clearly in conversations, presentations, and interactions with others.

OBSERVABLE BEHAVIORS:

☐ Speaks logically so that others can follow the reasoning.
☐ Speaks clearly enough so that others can understand the words.
☐ Uses appropriate grammar and vocabulary that do not detract from credibility.
☐ Directs the flow of a conversation by paraphrasing what the other person has said.
☐ Organizes ideas clearly.
☐ Presents ideas and opinions forcefully and directly.
☐ Organizes.
☐ Illustrates key points with concrete examples.
☐ Chooses explanations and examples that are appropriate for the audience.
☐ Predicts which topics might draw questions and is prepared to answer the questions.
☐ Uses visual aids effectively.
☐ Avoids distracting mannerisms.
☐ Focuses audience's attention on the desired outcome.
MECHANICAL APTITUDE
SKILL: The ability to apply mechanical principles in order to understand our products and services and their applications. These principles relate to our SBUs: Fluidics, friction, leverage, etc.

OBSERVABLE BEHAVIORS:
☐ Applies a principle to describe the how a system works.
☐ Provides appropriate educational credentials.
☐ Demonstrates work experience that required use of mechanical aptitude.
☐ Demonstrates ability to use mechanical terms and principal when discussing technologies.

ORGANIZATIONAL MANAGEMENT
SKILL: The ability to manage oneself and one’s resources in order to achieve Applied’s goals.

OBSERVABLE BEHAVIORS:
☐ Organizes resources to meet goals.
☐ Conveys a sense of urgency to achieve goals.
☐ Identifies what needs to be done and takes action.
☐ Follows up with others to ensure that commitments are kept.
☐ Maintains commitments in the face of obstacles and frustrations.
☐ Does what it takes to make the business successful.
☐ Produces accurate and meaningful reports.

STRATEGIC THINKING
SKILL: The ability to anticipate the implications and consequences of situations in a market that impact the branch’s short and long-term performance.

OBSERVABLE BEHAVIORS
☐ Evaluates the branch’s strengths and weaknesses as compared to competitors.
☐ Displays an in-depth understanding of competitive products and services within the marketplace.
☐ Analyzes the marketplace and the branch’s current and potential opportunities.
☐ Discusses market conditions with colleagues in like industries.
☐ Prepares a branch business plan that addresses short and long-term strategies.
WRITTEN COMMUNICATIONS
SKILL: The ability to express oneself clearly in business writing.

OBSERVABLE BEHAVIORS

☐ Organizes written ideas clearly.
☐ Uses concrete, specific language.
☐ Spells and punctuates correctly.
☐ Writes grammatically.
☐ Uses graphics and diagrams effectively to convey complex or technical information.
☐ Tailors communications to effectively reach a specific audience.

LEADING CHANGE
SKILL: The ability to effectively transform ________’s vision, mission, strategies and values into concrete actions that achieve results.

☐ Establishes a sense of urgency by examining the market and competitive realities.
☐ Creates a guiding coalition by getting upper management involved to support the change.
☐ Gets the branch associates to work together as teams to implement the change.
☐ Develops strategies that direct the change effort.
☐ Communicates the change vision and acts as a role model.
☐ Empowers action by identifying obstacles, and challenging structures that undermine the change.
☐ Encourages risk taking and innovation.
☐ Generates short-term wins and recognizes the associates who made it possible.
☐ Hires, develops, and promotes associates who can implement the change.
☐ Champions new approaches.
☐ Provides opportunities for people to learn to work together as a team.
☐ Ensures that all team members are treated fairly.
☐ Recognizes and encourages the behaviors that contribute to teamwork.
☐ Assigns important project to cross-functional teams.
☐ Empowers teams with decision-making authority.

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ANALYTICAL THINKING AND DECISION MAKING

SKILL: The ability to approach a problem or situation using logical, systematic, and sequential thinking and make the correct decision.

OBSERVABLE BEHAVIORS

☐ Approaches a complex task or problem by breaking it down into its component parts and considering each part in detail.
☐ Identifies many possible causes for a problem.
☐ Collects information from multiple sources.
☐ Notices discrepancies and inconsistencies in available information.
☐ Proposes multiple solutions.
☐ Carefully weights the priority of things to be done.
☐ Weighs the costs, benefits, risks, and chances for success in making decisions.
COMPETENCIES THAT CAN BE DEVELOPED

RECRUITING AND SELECTION
SKILL: The ability to recognize the competencies of candidates, and to staff the branch with those who display the immediate and long-term potential for high performance

OBSERVABLE BEHAVIORS
- Follows ________’s hiring policies.
- Uses competencies model for function to identify the abilities for which to select.
- Identifies sources of qualified candidates.
- Uses a screening process to select high potential candidates to interview.
- Asks the right questions to validate competencies.
- Explains what the company offers.
- Describes the working conditions, key responsibilities, major tasks and performance measures of the job.
- Selects and hires the highest potential candidate.

SALES MANAGEMENT
SKILL: The ability to develop and implement sales strategies that increase revenues, profitability, and customer satisfaction (Customer Jubilation).

OBSERVABLE BEHAVIORS
- Champions ________’s Cornerstone Strategy.
- Creates a branch business plan that defines the sales strategies.
- Implements sales strategies to increase volume and profitability in one’s own current and potential accounts.
- Creates strategies with sales associates to build their business.
- Develops the competencies of sales associates.
- Coaches sales associates to improve their performance.
- Maximizes leverage on the selling process by entering the sales cycle at the appropriate time.
- Models effective selling competencies.
- Creates win-win outcomes by negotiating effectively.
- Forms teams of specialists to support the sales process.
- Supports National Accounts activities.
- Develops alliances and partnerships with vendors and customers.

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TECHNICAL AND FUNCTIONAL KNOWLEDGE

SKILL: The ability to use a depth of knowledge and skill of _________’s products, services and resources to meet customer needs.

OBSERVABLE BEHAVIOR

☑ Applies technical knowledge to effectively solve a range of problems.
☑ Stays up-to-date on new and developing technologies,
☑ Learns the customers’ production processes.
☑ Develops the technical knowledge of others.

INFLUENCING OTHERS

SKILL: The ability to gain support from others for ideas, proposals, project and solutions

OBSERVABLE BEHAVIORS

☑ Presents arguments that address the most important concerns and issues of others and present win-win solutions.
☑ Involves others in a process or decision to ensure their support.
☑ Offers trade-offs or exchanges to gain commitment.
☑ Enlists experts or third parties to influence others.
☑ Works to make a strong impression on others.
☑ Seeks out and builds relationships with others who can help.
☑ Takes a personal interest in others.

DEVELOPING OTHERS

SKILL: The ability to help associates identify the competencies needed to become high performers; to help them set developmental goals; to help them identify and obtain the necessary resources; and to give them assignments that will help develop their competencies.

OBSERVABLE BEHAVIORS

☑ Plans and implements training for associates.
☑ Recognizes and praises behavior related to self-development,
☑ Provides opportunities to work on teams and projects.
☑ Involves associates in planning and decision making.
☑ Conducts regular developmental planning sessions with associates.
☑ Provides effective coaching and helpful feedback.
Branch Manager Competencies (Develop)  
& Observable Behaviors

BRANCH FINANCIAL MANAGEMENT
SKILL: The ability to operate a branch that meets or exceeds __________’s financial targets.

OBSERVABLE BEHAVIORS
☐ Operates within the constraints of the branch budget.
☐ Forecasts accurately sales and costs.
☐ Controls inventories to prescribed levels.
☐ Controls accounts receivable within guidelines.
☐ Achieves business plan.