

JOB COMPETENCY MODEL

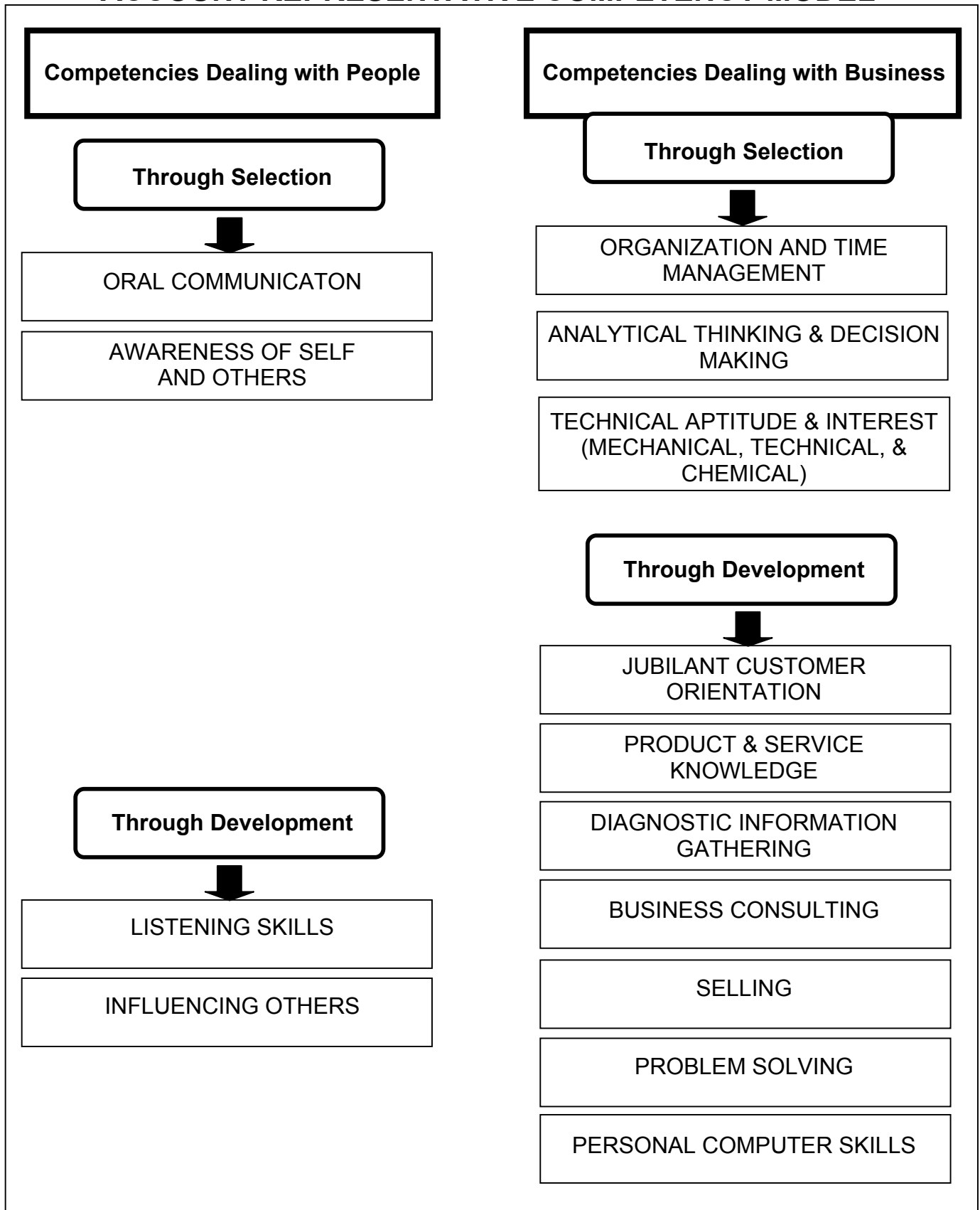
For the position of

Account Representative
ABC Company - Distribution Industry

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ACCOUNT REPRESENTATIVE COMPETENCY MODEL



KEY RESPONSIBILITIES

CREATING JUBILANT CUSTOMERS



GROWING THE BUSINESS PROFITABLY



ACCOUNT MANAGEMENT



INTERNAL COMMUNICATIONS



EDUCATION, TRAINING, AND DEVELOPMENT

KEY RESPONSIBILITY: CREATING JUBILANT CUSTOMERS

To provide so much value to our customers that they would not think of buying from anyone else.

MAJOR TASKS

- Provide technical expertise and value-added/created services.
- Educate oneself on customer's processes.
- Negotiate contracts and agreements for "win-win" outcomes.
- Communicate to customers the value reflected in DVA Reports.
- Providing data to the branch to facilitate on time and error-free service levels.
- Follow up to ensure that customer complaints are resolved quickly and to the customer's satisfaction.
- Follow-up on commitments to customers.
- Identify opportunities to exceed customer expectation * s.
- Maintain _____'s integrity by living the Core Values.
- Provide training.
- Interact with customers on a social and/or personal level.
- Conduct needs analysis for each customer.

PERFORMANCE MEASURES

- Customer Jubilation Letters
- QI Dialogues
- Account Penetration/Sales Growth/Gross Profit Growth
- SBU Sales Growth
- DVA Reports
- Complaint Logs
- Customer Endorsements
- Customer Referrals
- Customer Evaluations and Surveys

KEY RESPONSIBILITY: GROWING THE BUSINESS PROFITABLY

Responsible for maximizing sales volume, and increasing margins, by providing quality goods, services and solutions, increasing sales of more profitable technologies, and enlarging the customer base.

MAJOR TASKS

- Analyze and evaluate the net profit potential of each opportunity.
- Track customer margin history.
- Apply the cornerstones of our strategy.
 - ◆ Introduce new technologies into existing customer base.
 - ◆ Move from unit item sales to selling up time and productivity.
 - ◆ Increase awareness that we are more than a bearing company.
- Prospect for new customers.
- Prepare and present proposals.
- Negotiate profitable terms and conditions.
- Profile SBU potentials for each account (Best Practice #3).
- Develop an individual strategy for each account (Best Practice #4).
- Make joint calls with product specialists and manufacturer's reps.
- Build long-term relationships with customers.
- Set measurable goals (i.e. prospect for X new customers each month).
- Develop territory market plans (daily, weekly, monthly).

PERFORMANCE MEASURES

- Sales Dollars/Gross Profit Dollars
- Gross Profit Percent
- Rate of Sales Growth
- Market Share
- SBU Penetration and sales growth
- Return on time invested (ROTI)
- PRO 60/ PRO 500
- Sales Growth at Targeted Accounts
- New Business Opportunities Report (N80)
- Monitor Business Plan
- Report 15
- Report 1910
- Accounts Receivable Aging Analysis -

KEY RESPONSIBILITY: ACCOUNT MANAGEMENT

Managing the relationship between the customer and applied in an efficient and effective manner.

MAJOR TASKS

- Research product alternatives for customer applications.
- Help the customer manage inventory through inventory analysis, timely returns and exchanges, and lower cost alternatives.
- Identify opportunities to improve productivity and efficiency.
- Provide TQM and transaction cost analysis.
- Maintain regular contact with all account buying influences.
- Take advantage of opportunities for team selling.
- Provide the customer with a steady flow of useful information that meets their needs (i.e. competitive pricing, product availability, and internal process analysis).
- Act as a liaison between the customer and the manufacturer.
- Train/update customers on new technologies.
- Use the appropriate negotiation techniques for a "win/win" solution.
- Understand customer/department direction and goals.

PERFORMANCE MEASURES

- DVA Reports
- Sales Growth
- Profit Growth
- Account Penetration
- SBU Penetration
- Call reports/Itineraries
- Feedback from Manufacturer's Reps
- Feedback from all buying influences
- Feedback from management
- Customer Evaluation and Surveys

KEY RESPONSIBILITY: INTERNAL COMMUNICATION

Facilitate the flow of information from customers to the branch, technical support, DCs, and vendors.

MAJOR TASKS

- Update inside sales on account activity.
- Build long-term relationships with internal resources (team player).
 - ◆ Explain applications to CSSRs
 - ◆ Utilize them for team selling and to resolve customer problems
- Alert management of competitive and market activity,
- Provide vendors with product performance feedback.
- Alert the branch regarding potential customer problems.
- Submit internal reports.
 - ◆ Sales forecasts for top 10-25 accounts, and large potential accounts
 - ◆ Call reports/Weekly itineraries
- Seek advice on product applications,
- Work with management on vendor issues. and opportunities.
- Follow-up on quotations.
- Build long-term relationships with vendors.
- Identification and communication of opportunities outside of one's territory.

PERFORMANCE MEASURES

- Year Forecast
- DVA Reports
- Q/ Surveys
- Call Reports/Itineraries
- Complaint Logs
- Budget
- Customer Jubilation Letters
- Updated Customer Mailing List (for _____ News, etc.)
- Updated customer account profiles
- Credit Memo log
- ISO Involvement/Quality Meetings
- Price Guides

KEY RESPONSIBILITY: EDUCATION, TRAINING, & DEVELOPMENT

Responsible for developing the skills, knowledge, and abilities needed for present and future roles and responsibilities.

MAJOR TASKS:

- Take responsibility for one's own development.
- Acquire product knowledge.
- Research customer environment (for key customers).
 - ◆ Technology
 - ◆ Markets
 - ◆ Industry
 - ◆ Applications
 - ◆ Financial condition (i. e. creditworthiness, etc.)
 - ◆ Competitive assessments
- Discuss developmental needs with manager.
- Set personal learning and development goals.
- Conduct self-assessment of skills, knowledge, and abilities.
- Takes advantage of learning opportunities ("yearn to learn").

PERFORMANCE MEASURES

- Training Log
- Performance Assessment (Developmental Self-Assessment)
- Degrees and Certifications
- Wellness Program Participation
- Career Advancement
- Supervisory and Peer feedback
- Recognition and Awards

COMPETENCIES THAT CAN BE DEVELOPED

COMPETENCY: LISTENING SKILLS

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

OBSERVABLE BEHAVIORS

- Receives the entire message before reacting to it
- Focuses on the message regardless of internal or external distractions.
- Recognizes patterns in the message for themes and intentions.
- Considers body language to help focus on the message.
- Empathizes with the speaker.
- Responds effectively to both the words and tone of voice (meaning behind the words).
- Summarizes or paraphrases what others have said to verify understanding and prevent miscommunication.
- Relates well to messages from various perspectives.

COMPETENCY: 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 presents "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.

COMPETENCY: JUBILANT CUSTOMER ORIENTATION

SKILL: The ability to demonstrate a commitment to his or her customer's immediate, as well as long term, success.

OBSERVABLE BEHAVIORS

- Responds thoroughly and honestly to customer concerns.
- Fully educates prospective users about product features, benefits, and applications.
- Lives the Core Values.
- Makes recommendations on the basis of customers' long-term needs not on what the account representative thinks he or she can sell or needs to sell.
- Uses management to make joint calls to solidify customer relationships.
- Positions the capabilities and shortcomings of his or her products and organization realistically.
- Uses knowledge of customer's business and environment to meet their needs.
- Solves customer's problems quickly and effective/y.
- Presents a cheerful, positive, professional manner with customers.
- Asks customers about their satisfaction with _____'s products and service levels.
- Measures customer satisfaction.
- Suggests Improvements in internal processes to raise customer satisfaction levels.

COMPETENCY: DIAGNOSTIC INFORMATION-GATHERING

SKILL: The ability to identify the information needed to clarify a situation; seek information from appropriate sources, and using skillful questioning to draw out information.

OBSERVABLE BEHAVIORS

- Asks questions to clarify situations.
- Seeks out knowledgeable people from which to obtain information.
- Probes skillfully to get at the facts.
- Checks multiple sources to get more complete and accurate information.
- Refers to information in technical manuals, catalogues, specification sheets and other publications.
- Maintains network of contacts.
- Uses available electronic information sources.
- Resolves potential problems in their early stages.

COMPETENCY: PRODUCT AND SERVICE KNOWLEDGE

SKILL: The ability to use a depth of knowledge and skill to match customer needs with _____'s products and services.

OBSERVABLE BEHAVIORS

- Locates the appropriate product or service quickly.
- Suggests product alternatives and interchanges focusing on "uptime" and value creation.
- Uses knowledge to identify other sales opportunities.
- Introduces new technologies and capabilities to customers.
- Uses knowledge of applications to effectively problem-solve.
- Uses measuring tools to determine appropriate products.
- Scores well on vendor school tests.

COMPETENCY: BUSINESS CONSULTING

SKILL: The ability to develop his or her business knowledge and use what he or she knows to identify needs and solve problems.

OBSERVABLE BEHAVIORS

- Demonstrates the cost-cutting or process improvement benefits of a product.
- Focuses on the big picture not on details, in the early stages of a relationship.
- Communicates at the listener's level of knowledge and sophistication.
- Identifies issues and needs at all levels, be they business, organizational, functional, individual issues or needs.
- Shares useful business information with customers.
- Follows up to ensure customer satisfaction.
- Participates in customer business improvement teams.

COMPETENCY: SELLING

SKILL: The ability to assess inquiries; identify opportunities to match needs with _____'s products and services; propose solutions; negotiate price, terms, and conditions; and get the order.

OBSERVABLE BEHAVIORS:

- Effectively asks questions to qualify prospects.
- Uses effective listening skills.
- Engages customer in identification and confirmation of needs.
- Explains _____'s products and/or services that meet the need.
- Proposes creative solutions.
- Uses obstacles as a challenge - selling begins with "no".
- Identifies opportunities for selling up and add-on sales.
- Creates perception of value in customer's eyes.
- Gains customer confidence and commitment
- Helps the customer choose the right solution.
- Explains the terms and conditions of the sale and supports with formal documentation and quotations.
- Obtains agreement to buy.
- Follows up to ensure customer satisfaction,
- Communicates key customer information to other associates as appropriate.
- Refuses to give up in the face of obstacles.
- Employs effective territory and time management skills.

COMPETENCY: PROBLEM SOLVING

SKILL: The ability to identify and resolve problems in a logical, systematic and sequential manner.

OBSERVABLE BEHAVIORS

- Identifies many possible causes for a problem.
- Notices discrepancies and inconsistencies in available information.
- Breaks problems down into component parts (uses flowcharts if necessary).
- Identifies root causes rather than symptoms.
- Compares two or more alternatives in a systematic way.
- Offers the customer more than one solution to the problem.
- Explains the costs, benefits, and risks of each solution.
- Thinks 'outside the box' for solutions.
- Uses a formal, documented corrective action process.

COMPETENCY: PERSONAL COMPUTER SKILLS

SKILL: The ability to use computers to quickly access, filter through, and analyze information.

OBSERVABLE BEHAVIORS

- Accesses company information such as:
 - ◆ Sales figures
 - ◆ Profit margins
 - ◆ Inventory data
 - ◆ Performance against goals
 - ◆ Operational data from various functions.
- Uses market information, such as industry and competitive data.
- Uses computer as a database to track customer information such as key contacts, addresses, profiles, and past business activities.
- Uses the appropriate software to create effective proposals and presentations.
- Uses the appropriate software to analyze inventory and usage.
- Uses _____ inventory management function and back order reports as a tool for key customers.

PREREQUISITE COMPETENCIES TO SELECT FOR

COMPETENCY: ORAL COMMUNICATIONS

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

OBSERVABLE BEHAVIORS:

- Organizes ideas clearly and 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.
- Presents ideas and opinions vigorously and directly:
 - ◆ 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.

COMPETENCY: AWARENESS OF SELF & OTHERS

Characteristic: The ability to notice when one's behavior has an effect on others, and to adjust when appropriate, in order to build strong relationships.

- Listens attentively to other's ideas and concerns.
- Understands both the strengths and weaknesses of oneself and others. a Understands unspoken meaning in a situation.
- Offers assistance and support when needed.
- Changes one's behavior to be more effective.
- Does what one commits to do, takes responsibility, and carries one's share of the workload.
- Demonstrates a positive attitude.
- Sees other's point of view.
- Makes others feel comfortable.
- Interprets accurately what others are feeling.
- Anticipates how others react to situations.
- Speaks honestly and forthrightly with people.
- Overcomes rejection.

COMPETENCY: ORGANIZATION & TIME MANAGEMENT

SKILL: The ability to manage oneself and one's resources in order to achieve _____'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.
- Plans, prioritizes, and schedules effectively.
- Monitors the quality of one's work.
- Makes and keeps appointments when appropriate.
- Develops and accomplishes effective long and short term goals.
- Develops measurement system to track return on time invested (ROTI).

COMPETENCY: 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 weighs the priority of things to be done.
- Weighs the costs, benefits, risks, and chances for success in making decisions.

**COMPETENCY: TECHNICAL APTITUDE & INTEREST (MECHANICAL, ELECTRICAL, &
CHEMICAL)**

SKILL: The ability to apply mechanical principles in order to understand our products and services and their applications.

OBSERVABLE BEHAVIORS

- Scores within an acceptable range on a mechanical comprehension test. (When available).
- Uses technical principles to describe how a system works.
- Provides evidence of previous technical training.
- Demonstrates work experience that required use of mechanical aptitude.
- Applies technical knowledge to effectively solve a range of problems.
- Stays up-to-date on new and developing technologies.
- Learns and understands the customer's production processes.
- Uses curiosity as a motivation for problem-solving.
- Uses available training and resources (internal and external) to improve one's knowledge.