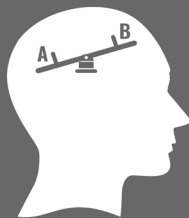


Data Analyst



ABSTRACT

The purpose of this framework is to define the knowledge, skills, and behaviors that drive expert performance in the marketing of Cat® products and solutions through dealerships. These competencies were developed and validated through extensive research and review of best practices, as well as input from top dealer marketing professionals and subject matter experts from Across the Table.

COMPETENCY

A competency is a cluster of related knowledge, skills, and behaviors that

- Affect a major part of one’s job
- Correlates with performance on the job
- Can be measured against well-accepted standards
- Can be improved through training and development

Each competency is broken down into three proficiency levels.

PROFICIENCY

Proficiency is a performance that is observable or measurable; consider it a “snap shot” of how a person is actually performing on the job. The knowledge, skills, and behaviors in each competency are cumulative, meaning one level builds on the previous and an individual demonstrating proficiency at a particular level can be assumed to perform effectively at all levels below. It should be noted that these proficiencies do not represent the full scope of the knowledge, skills, and behaviors within a given competency, but are considered to be key indicators of a person being deemed competent at a particular proficiency level.

Global Dealer Learning provides the following proficiency levels to help you gauge performance:

| LEVEL 1 L1 | LEVEL 2 L2 | LEVEL 3 L3 |
|--|--|---|
| Possesses knowledge of basic techniques and concepts for a competency. Utilizes the full range of reference and resource materials. Completes simple tasks on own; requires guidance with complex tasks. | Applies terms, concepts, and principles related to a competency. Discusses applications and issues in this area. Performs tasks to standard, without guidance. | Possesses extensive knowledge, skill, and experience. Coaches and assesses others in application of the competency. Solves complex problems and is routinely sought for advice. |

CURRICULA

Competencies and their underlying proficiencies serve as building blocks for organizing training into a curriculum. Just like universities organize their curriculum into Freshman, Sophomore, Junior, and Senior levels, Global Dealer Learning organizes curriculum into Foundational, Advanced, and Expert.

PUTTING IT ALL TOGETHER

Dealer Marketing Competency Dictionary identifies the competencies and the target proficiency of each competency.

Competency descriptions provide a competency overview and details on the knowledge, skills, and behaviors for each proficiency level. These can be used to identify placement in the proficiency spectrum.

Learning solutions are provided for each proficiency level and are aligned back to Global Dealer Learning curricula to help managers and learners identify courses to take to continue their professional development.

The curricula that pertain to this job role can be found at Caterpillar's online Dealer Performance Center (DPC). A completed and updated list of learning solutions for this job role's competencies are located within the Dealer Marketing Training Portal under the Sales Performance Campus.

For an explanation on any acronyms commonly found within the learning solutions of this competency dictionary (e.g., OSP, HMM, etc.), perform a word search within the Sales Performance Campus on the DPC.

LEARNING SOLUTIONS

Target Proficiency Levels

EXPERT

Pioneering
Knowledge, Skills
and Behaviors

Provide content containing in-depth knowledge of Caterpillar and dealer services. Courses offer insight to incorporate products and services options for integrated solutions for customers.

ADVANCED

Refining Knowledge, Skills and Behaviors

Provide content containing comprehensive material for a profession's generally-accepted principles, theories and best practices, as well as detailed product, industry and product application knowledge.

FOUNDATIONAL

Developing Knowledge, Skills and Behaviors

Provide content containing basic soft skills including industry practices as well as general overviews of industry, dealer and Cat products.

COMPETENCIES

| Category | Competency - Definition | Target Level |
|--------------------|--|--------------|
| CUSTOMER RETENTION | Communication Convey clear & effective verbal & written communication, for both internal and external audiences. | L2 |
| | Manage a Data Analyst Team Perform a management role supervising other data analysts at the dealership. | L3 |
| LEADERSHIP | Manage Vendor Relationships Manage third party organizations' contracts, relationships, & performance, controlling costs & mitigating risks. | L2 |
| | Select Employees Select the best employees to join the data analysis team. | L2 |
| | Apply Statistics Make use of statistics to verify & validate data analysis. | L3 |
| PERFORMANCE | Conduct Training Train others on the use & input of systems. | L1 |
| | Cultivate Marketing Automation Implement automatic messaging & processes to personalize marketing content. | L2 |
| | Maintain Systems Support & maintain data analysis systems & associated systems such as Customer Relationship Management. | L2 |
| | Perform Ad Hoc Analysis Respond to specific business requests by dealership & produce a model, report, or data summary | L2 |
| | Perform Data Analysis Utilize a systematic process of gathering, cleaning, evaluating, & modeling data to support decision-making. | L3 |
| | Use Systems Make use of various simple & complex data tools to perform data analysis | L2 |
| | | |

COMMUNICATION

Category: Customer Retention

Description: Conveys clear and effective verbal communication, active listening, and written communication. These skills apply to all internal and external communications.

The individual will:

| L1 | L2 | L3 |
|--|---|--|
| <p>Knowledge:</p> <p>Possess knowledge of techniques and concepts related to:</p> <ul style="list-style-type: none">• Verbal and written communication• Active listening• Culturally appropriate grammar and content <p>Skills:</p> <p>Perform the following communication-related tasks:</p> <ul style="list-style-type: none">• Create written communication appropriate for the needs of the specific audience (<i>e.g. emails, memos, presentations</i>)• Attend to and fully comprehend what others are saying• Communicate clearly and concisely with customers and peers• Use word choice, tone of voice, and body language to accurately communicate face-to-face and over the telephone <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of attentiveness to what others are saying regardless of type of communication (<i>e.g. memo, email, phone call, face-to-face</i>)• Be available and responsive to customer requests• Interpret non-verbal communication | <p>Knowledge:</p> <p>Recognize effective communication tools and take time to implement tools while communicating with customers, peers, and participants, and recognize cultural or regional differences in communication.</p> <p>Skills:</p> <p>Perform the following communication-related tasks:</p> <ul style="list-style-type: none">• Create sales quotes, proposals, and high level presentations• Facilitate meetings for internal and/or external audiences• Listen and ask questions to understand other people's viewpoints <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of applying communication style to suit proper audience (<i>e.g. high level management, decision makers, customers</i>)• Use proper language and terminologies in all communication styles and formats• Respond appropriately to verbal and non-verbal communication styles | <p>Knowledge:</p> <p>Demonstrate excellent verbal and written communication skills with customers and peers.</p> <p>Skills:</p> <p>Perform the following communication-related tasks:</p> <ul style="list-style-type: none">• Generate complex proposals and opportunity generation materials• Write position papers for use of sales team associated with an account• Conduct large group presentations and/or meetings• Balance phone calls, emails, and interruptions effectively <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of using written, verbal, and non-verbal communication to enhance performance• Use a variety of communication tools including face-to-face meetings, technology applications, telephone calls, emails, and audio/video conferences• Work effectively with different personalities across a variety of social and professional situations |

MANAGE A DATA ANALYST TEAM

Category: Leadership

Description: Performs a management role supervising other data analysts at the dealership.

The individual will:

| L1 | L2 | L3 |
|--|--|--|
| <p>Knowledge:</p> <p>Demonstrate familiarity with management knowledge regarding assignment of tasks, motivational strategies, and evaluation of others' work.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Ask Information Technology (IT) for information• Ask VisionLink® coordinator for information• Work with Sales to improve data standards <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of dealership vision and values• Conduct data analysis utilizing others within the organization that do not directly report to him/her | <p>Knowledge:</p> <p>Demonstrate proficiency of management knowledge regarding assignment of tasks, motivational strategies, and evaluation of others' work.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Manage an individual who is responsible for less complex data analyst projects• Manage an individual that serves as a gatekeeper for the Customer Relationship Management (CRM) system• Manage and direct employee performance• Follow and enforce human resource policies and procedures• Develop talent within individuals on his/her team <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of teamwork• Lead one or two other individuals assisting with data analysis• Convey clear expectations to the team regarding how their work influences executive decisions | <p>Knowledge:</p> <p>Demonstrate mastery of management knowledge and be sought for guidance to:</p> <ul style="list-style-type: none">• Assign work projects• Motivate for results• Assure accuracy of others' work• Assure completion of others' work <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Divide data team by specialty• Conduct team meetings to coordinate/control data analysis projects• Ensure analysts are receiving training and exposure to analytics tools and techniques <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of detail and organizational skill• Effectively lead an integrated team of specialized data analysts |

MANAGE VENDOR RELATIONSHIPS

Category: Leadership

Description: Decides whether to engage or enable third party organizations to control costs and mitigate risks. Optimally develops, manages and controls vendor contracts, relationships and performance for the efficient delivery of contracted marketing services to meet business objectives and ensure proper lead funnel and customer experience management.

The individual will:

| L1 | L2 | L3 |
|--|---|--|
| <p>Knowledge:</p> <p>Demonstrate familiarity with management knowledge regarding assignment of projects/tasks, motivational strategies, evaluation of vendor work, and cost effectiveness.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Gather information from vendors• Provide clearly defined and visible leadership commitment to anti-bribery compliance• Conduct appropriate due diligence on third parties and their activities• Conduct a clearly defined and visible commitment to anti-trust compliance• Conduct “buy” vs “hire” decisions• Commission graphic artist to create a direct mail piece• Select a print vendor to create a drop-off piece for the sales group• Oversee customer satisfaction reporting• Use data compilation service to generate prospect lists <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of dealership vision and values• Manage vendors who are supplying information and/or executing tasks | <p>Knowledge:</p> <p>Demonstrate proficiency with management knowledge regarding assignment of projects/tasks, motivational strategies, evaluation of vendor work, and cost effectiveness.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Work with Enterprise Resource Planning (ERP) and/or Customer Relationship Management (CRM) vendors on improvements• Work with vendor to perform Search Engine Optimization services• Retain a vendor to launch and maintain the dealership’s website and shopping cart <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of inter-organizational partnerships• Manage vendors who are providing systems | <p>Knowledge:</p> <p>Demonstrate mastery of management knowledge and be sought out for guidance to:</p> <ul style="list-style-type: none">• Determine projects and tasks to assign to vendors• Motivate vendors for results• Assure accuracy of vendor’s work• Assure completeness of vendor’s work• Measure cost effectiveness of the “buy” vs. “hire” decision <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Hire a vendor to create a dashboard for the sales group on critical Key Performance Indicators (KPIs)• Retain an advertising agency to launch a new product in their territory• Retain a vendor to provide customized outbound contract center lead generation activities <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of cross-organizational communication• Manage vendors who need to understand the business requirements of the dealership |

SELECT EMPLOYEES

Category: Leadership

Description: Selects the best employees to join the data analysis team.

The individual will:

| L1 | L2 | L3 |
|--|--|--|
| <p>Knowledge:</p> <p>Demonstrate familiarity with some elements of the dealership employee selection process and legal requirements:</p> <ul style="list-style-type: none">RecruitmentScreeningInterviewingAssessmentCoordination <p>Skills:</p> <p>Perform the following employee selection related tasks:</p> <ul style="list-style-type: none">Establish reporting rights and responsibilitiesProvide leadership with information for the selection and interviewing of new data analysis employee applicantsDetermine competitiveness of dealership compensation and benefits packagesExecute some of the elements of the employee selection process <p>Behaviors:</p> <ul style="list-style-type: none">Value the importance of the dealership selection model for the hire of employeesAct as a resource for leadership when asked to interview a candidate | <p>Knowledge:</p> <p>Demonstrate familiarity with all elements of the dealership employee selection process and legal requirements.</p> <p>Skills:</p> <p>Perform the following employee selection related tasks:</p> <ul style="list-style-type: none">Utilize a pre-defined selection process when asked to assist in selecting new hiresScreen applicant lists effectivelyCustomize and create interview questionsConduct selection interviewsDeploy personality profiling/ testing as needed for the dealershipDevelop and reinforce a learning plan for each employee <p>Behaviors:</p> <ul style="list-style-type: none">Value the time investment of the prospective hire as well as the dealership towards the employee selection processProvide a comfortable and efficient interview atmosphere and processModel professional correspondence practices throughout the employee selection process | <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of the dealership employee selection process and legal requirements, and have established effective on-boarding and retention processes.</p> <p>Skills:</p> <p>Perform the following employee selection related tasks:</p> <ul style="list-style-type: none">Plan staffing requirements in alignment with dealership data analysis planDevelop/groom individuals for future assignmentsReach out to available labor poolsCollaborate an effective on-boarding process <p>Behaviors:</p> <ul style="list-style-type: none">Value the importance of the selection and retention of employeesEstablish a good working relationship with labor poolsProvide the basis for a positive work environment that fosters employee retention |

APPLY STATISTICS

Category: Performance

Description: Makes use of statistics to verify and validate data analysis.

The individual will:

| L1 | L2 | L3 |
|--|--|--|
| <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of basic statistics.</p> <p>Skills:</p> <p>Perform the following data-related tasks:</p> <ul style="list-style-type: none">• Use descriptive statistics (<i>e.g. averages, ranges</i>)• Analyze the success of campaigns• Interpret results of analysis <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of applied statistical techniques• Be inquisitive about data | <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of quantitative analysis.</p> <p>Skills:</p> <p>Perform the following data-related tasks:</p> <ul style="list-style-type: none">• Perform forecasting and time series analysis• Perform opportunity analysis• Perform competitive analysis• Perform financial analysis• Verify recommendations are statistically valid <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of impact of applied statistical techniques on the confidence level of decision makers• Demonstrate a desire to further learning by acquiring certifications (<i>e.g. Business Analytics Certificate</i>) | <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of higher-order statistics and mathematics.</p> <p>Skills:</p> <p>Perform the following data-related tasks:</p> <ul style="list-style-type: none">• Build own algorithms to apply to data• Determine variables correlated to branch store performance• Perform hierarchical clustering to statistically validate similarities and correlations between disparate groups• Use various optimization techniques of linear programming to optimize variable cost structures in constrained production environments <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of business performance• Derive insight towards business performance• Model positive influence towards business performance |

CONDUCT TRAINING

Category: Performance

Description: Trains others on the use and input of systems

The individual will:

| L1 | L2 | L3 |
|--|---|---|
| <p>Knowledge:</p> <p>Demonstrate knowledge of how to conduct training within various systems.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Train salespeople how to use the Customer Relationship Management (CRM) system• Answer questions that arise on main data systems and be the “point of contact” for questions and issues• Check for knowledge and understanding throughout the training process• Educate Parts Counter Advisors (PCAs) on new related parts featured in the Dealer Business System (DBS) <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of patience and understanding in training• Exhibit a strong desire and ability to audit data systems• Assess for sufficient data quality and quantity | <p>Knowledge:</p> <p>Demonstrate knowledge of how to provide “spot training” to individuals using various systems.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Counsel salespeople on the proper use of machine hours• Answer a question on the use of a spreadsheet provided to a manager• Attend periodic webinars and contribute to discussions and online forums• Conduct business-to-business training session at the dealership• Create useable training and performance support materials <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of the assessment of learning• Look for potential upgrades and improvements to bolster the use of data systems• Keep trainees informed as to what they are selling | <p>Knowledge:</p> <p>Utilize a documented process through consultation with other departments to develop highly effective training materials.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Consult with other departments on their use of marketing information systems and develop training materials to transfer knowledge• Customize the CRM system to the unique structure of the dealership and develop training materials to educate the sales group on the change• Produce a customer density map of the areas considered for a new branch and train executives on its use and interpretation• Attend or present best practices at internal or external conferences <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of a well-developed training process• Impart problem solving strategies and insight for those whom they train |

CULTIVATE MARKETING AUTOMATION

Category: Performance

Description: Analyzes prospect behavior and provides data points and recommendations for effective automated marketing tasks, such as emails, social media, and other website actions, to nurture prospects with highly personalized, useful content.

The individual will:

| L1 | L2 | L3 |
|--|---|---|
| <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of simple marketing automation.</p> <p>Skills:</p> <p>Perform the following marketing related tasks:</p> <ul style="list-style-type: none">• Construct simple, internal, non-customer facing data automation• Create an automatic report of when equipment comes out of warranty to notify the sales representative• Create a flag in the Customer Relationship Management (CRM) system when a customer has not been called as required by their Planned Annual Rate of Call (PAR) <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of using simple marketing automation• Exhibit a strong interest in organizing automated marketing processes | <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of complex marketing automation.</p> <p>Skills:</p> <p>Perform the following marketing related tasks:</p> <ul style="list-style-type: none">• Create a system for online sales tools to prompt customers to buy related and predicted parts and maintenance supplies• Model prospect response to a customer event• Apply marketing automation to pre-existing campaigns <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of using complex marketing automation• Apply marketing automation to reduce marketing labor | <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of applying marketing automation toward sophisticated marketing campaigns.</p> <p>Skills:</p> <p>Perform the following marketing related tasks:</p> <ul style="list-style-type: none">• Create a campaign work flow• Follow customers who go to the website (e.g. "cookies" and other tracking devices)• Evaluate situations where applying marketing automation could be beneficial <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of applying marketing automation to customize customer experiences• Apply marketing automation to tailor messaging based on customer actions |

MAINTAIN SYSTEMS

Category: Performance

Description: Supports and maintains data analysis systems and associated systems such as Customer Relationship Management (CRM).

The individual will:

| L1 | L2 | L3 |
|---|---|--|
| <p>Knowledge:</p> <p>Demonstrate extensive knowledge of simple data systems that will optimize their accuracy and usability.</p> <p>Skills:</p> <p>Perform the following maintenance related tasks:</p> <ul style="list-style-type: none">• Test to confirm data accuracy• Cleanse data to assure information is correct• Maintain confidentiality of information by protecting systems and incorporate data security protocols• Manage the quality and quantity of customer email addresses <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of maintaining simple data systems• Oversee use and deployment of simple data analysis and gathering systems | <p>Knowledge:</p> <p>Demonstrate extensive knowledge of complex data systems that will optimize their accuracy and usability.</p> <p>Skills:</p> <p>Perform the following maintenance tasks:</p> <ul style="list-style-type: none">• Ask for help from Information Technology (IT) when needed• Input information into visualization software• Oversee software maintenance <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of maintaining complex data systems• Oversee use and deployment of complex data analysis and gathering systems | <p>Knowledge:</p> <p>Demonstrate mastery of complex data systems and collaborate with system manufacturers to adjust data systems to produce optimal output.</p> <p>Skills:</p> <p>Perform the following maintenance tasks:</p> <ul style="list-style-type: none">• Work with vendors to produce customized reports• Utilize the Dealer Business System (DBS) for mapping to the system• Diagnose potential issues• Oversee data integrity <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of optimal system output• Oversee and collaborate with the optimization of all data analysis and gathering systems• Act as befitting the system champion |

PERFORM AD HOC ANALYSIS

Category: Performance

Description: Follows a business intelligence process designed to answer a single, specific business question asked by others within the dealership; typically producing a statistical model, analytic report, or other type of data summary.

The individual will:

| L1 | L2 | L3 |
|---|--|---|
| <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of descriptive (what happened) data analysis and be able to apply to internal customer requests.</p> <p>Skills:</p> <p>Perform the following ad hoc related tasks:</p> <ul style="list-style-type: none">• Provide information upon request• Provide target customer lists to Marketing• Create “on the fly” equivalents for competitive machines (e.g. fuel burn, weight, etc.) for salespeople selling in the field or by phone• Determine marketing segments for targeted promotions• Create a zip code finder to allow the dealership to quickly determine which sales representative will cover a new customer <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of data-driven decision making at a dealership• Be responsive to descriptive data analysis requests from an internal customer• Listen carefully to business requirements | <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of diagnostic (why it happened) data analysis and be able to apply to internal customer requests.</p> <p>Skills:</p> <p>Perform the following ad hoc related tasks:</p> <ul style="list-style-type: none">• Ask the right questions to ascertain the customer’s exact requirements• Analyze leads following from company advertising and public relations efforts• Work with surveys of customer satisfaction Net Loyalty Score (NLS) to determine needed operational changes <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of data analysis as it pertains to formulating solutions• Apply data-driven decision making to complex business situations | <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of the predictive (what will happen) and prescriptive (how something can be made to happen) data analysis and be able to apply to internal customer requests.</p> <p>Skills:</p> <p>Perform the following ad hoc related tasks:</p> <ul style="list-style-type: none">• Address abstract business needs with information• Use local economic reports to generate forecasts for specific business units at the dealership• Work with sales group to redo compensation plans• Look at what drives a particular customer response in order to tailor future promotions <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of data analysis as it pertains to proactive decision-making• Be able to take abstract requests and determine how to meet the information needs required |

PERFORM DATA ANALYTICS

Category: Performance

Description: Follows a permanently embedded, proactive systematic process of gathering, cleaning, evaluating and modeling data with the goal of discovering conclusions and supporting decision making. Methods include data mining, text analytics, business intelligence, data visualization, applying statistical and/or logical techniques, etc.

The individual will:

| L1 | L2 | L3 |
|--|--|---|
| <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of descriptive (what happened) data analysis.</p> <p>Skills:</p> <p>Perform the following data-related tasks:</p> <ul style="list-style-type: none">• Analyze lost sales and Uniform Commercial Code (UCC) data (if available)• Provide leads to the sales group• Produce and distribute Marketing operations Key Performance Indicators (KPIs) to leadership• Review bidder lists for large projects to determine if bidders are customers of the dealership• Review accounts to ensure customers are receiving the appropriate discount• Calculate the participation rate based on dealership sales vs. industry sales• Create win/loss reports by sales representatives from the Customer Relationship Management (CRM) system• Quantify the quality of the customer experience for continuous improvement <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of data-driven decision making at the dealership• Be able to locate data and extract it for further analysis• Discern applicable data for statistical validation or verification | <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of diagnostic (why it happened) data analysis.</p> <p>Skills:</p> <p>Perform the following data-related tasks:</p> <ul style="list-style-type: none">• Analyze market shares through tools such as Opportunity Lead Generation Analyzer (OLGA)• Combine OLGA with other key data sources to gain understanding on lost business• Analyze Percent of Industry Sales (PINS) data and Percent of Parts Sales (POPS)• Generate economic indicator reports• Create performance scorecards for the salespeople (e.g. participation rates, win/loss ratios)• Assist manager with broad-based requests• Consider “tribal knowledge” when creating business intelligence <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of data analysis as it pertains to formulating solutions• Be intrinsically motivated to investigate reasons why the data results are what they are | <p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of predictive (what will happen) and prescriptive (how something can be made to happen) data analysis.</p> <p>Skills:</p> <p>Perform the following data-related tasks:</p> <ul style="list-style-type: none">• Perform market basket analysis to predict cross-sell and up-sell opportunities• Perform root cause analysis• Study new accounts to transmit leads to the sales group• Analyze salesperson territories and make suggestions on coverage realignments• Create Recency/Frequency/Monetary (RFM) value customer segmentation analysis for marketing• Analyze repair history data to predict future needs <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of data analysis as it pertains to proactive decision-making• Integrate business information with other processes• Be able to efficiently locate indicators and changes in trends |

USE SYSTEMS

Category: Performance

Description: Makes use of data tools to perform data analysis including (but not limited to): Excel, Access, SQL, Google Analytics, DBS, Zift, Tableau.

The individual will:

| L1 | L2 | L3 |
|---|---|---|
| <p>Knowledge:</p> <p>Utilize foundational data analysis tools such as Excel, Access, and SQL, and be familiar with the basic features of each program.</p> <p>Skills:</p> <p>Perform the following computer-related tasks:</p> <ul style="list-style-type: none">• Use Microsoft Excel to perform data analysis• Use SQL to extract data from the Dealer Business System (DBS)• Use Google Analytics to analyze the responses on a per-click advertising campaign• Use online third party data sources such as EDA (UCCs), Dun and Bradstreet <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of utilizing different data analytical tools• Begin to utilize more advanced features on foundational systems | <p>Knowledge:</p> <p>Utilize the advanced features of data analysis tools such as Excel, Access, and SQL, and is familiar with some advanced systems.</p> <p>Skills:</p> <p>Perform the following computer-related tasks:</p> <ul style="list-style-type: none">• Use pivot tables in Excel to analyze data• Use the DBS for data analysis• Use sophisticated analytics to measure campaigns• Use macros in Excel <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of each data analytical tool and their most optimal and appropriate use• Determine the most appropriate system for the required data analysis task• Begin to utilize advanced systems on a more frequent basis | <p>Knowledge:</p> <p>Utilize advanced data analysis systems such as Zift and Tableau and the advanced features of those systems.</p> <p>Skills:</p> <p>Perform the following computer-related tasks:</p> <ul style="list-style-type: none">• Use advanced modeling software• Use IBM SPSS modeler to build predictive models• Use R programming language for statistical computing and graphics• Direct automated publication of analytics results on sophisticated dashboards <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of the benefits of advanced systems and their advanced features• Provide results of data analysis in presentable, easily understood terms and graphics• Display mastery of advanced systems and their advanced features |

YOUR ONLINE LEARNING SOLUTIONS AWAIT YOU AT THE



Click the image above to be directed to the Sales Performance Center. Once there, locate the Dealer Marketing Training Portal to find the learning solutions to these competencies for your job role or follow the direct links provided below:

| | |
|--------------------|--|
| CUSTOMER RETENTION | Communication Learning Curriculum |
| LEADERSHIP | Manage a Data Analyst Team Learning Curriculum |
| | Manage Vendor Relationships Learning Curriculum |
| | Select Employees Learning Curriculum |
| PERFORMANCE | Apply Statistics Learning Curriculum |
| | Conduct Training Learning Curriculum |
| | Cultivate Marketing Automation Learning Curriculum |
| | Maintain Systems Learning Curriculum |
| | Perform Ad Hoc Analysis Learning Curriculum |
| | Perform Data Analysis Learning Curriculum |
| | Use Systems Learning Curriculum |

NOTE: You may need to be logged into DPC in your browser for these links to work.

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