

# Marketing Coordinator



# 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.

# COMPETENCIES

Category	Competency - Definition	Target Level
ADMINISTRATIVE	<b>Systems Proficiency</b> Uses hardware, software, and other enablers effectively.	L2
CUSTOMER RETENTION	<b>Communication</b> Convey clear & effective verbal & written communication.	L2
	<b>Customer Care and Relationship Development</b> Meets customer expectations with excellent customer service by adding value.	L2
LEADERSHIP	<b>Enhance Customer Interactions</b> Understands and documents customer experiences through the full cycle of interactions.	L2
	<b>Leadership of the Dealer Brand</b> Construct & manage a brand strategy & implement plans.	L3
	<b>Project Management</b> Use processes/methods to achieve planned objectives.	L2
	<b>Manage Digital Marketing Channels</b> Manage the leveraging of electronic media to promote dealership products & services.	L2
	<b>Manage Traditional Marketing Channels</b> Manage the delivery of marketing content through traditional media to promote dealership products & services.	L2
	<b>Manage Vendor Relationships</b> Manage third party organizations' contracts, relationships, & performance, controlling costs & mitigating risks.	L2
	<b>Manage Event Logistics</b> Coordinates and organizes dealer customer events and trade shows to build customer relationships.	L3
PLANNING	<b>Consult with Internal Customers</b> Determine internal challenges & opportunities.	L2
	<b>Strategic Dealership Planning</b> Construct & manage a brand strategy & implement plans.	L2
PROFESSIONAL DEVELOPMENT	<b>Participate in Continuous Learning</b> Pro-actively investigates new perspectives, approaches, and behaviors, and takes steps to evaluate and improve performance.	L2

## 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 Cat® and dealer services. Courses offer insight into corporate products and services options of 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.

# SYSTEMS PROFICIENCY

**Category:** Administrative

**Description:** Uses computer components, application software, and other enablers effectively. Includes knowledge of productivity applications and business applications.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Possess basic knowledge of the functions, concepts, and structures of:</p> <ul style="list-style-type: none"><li>• Word processing applications, worksheet, applications, and database applications (e.g., MS Office®)</li><li>• Computing, operating system, Internet technology, web services and web applications.</li><li>• Business applications and information systems utilized by Cat® and the dealer (e.g., Dealer Business System (DBS), Customer Relationship Management (CRM), Service Information System (SIS), OLGA etc.)</li></ul> <p><b>Skills:</b></p> <p>Perform the following system-related tasks:</p> <ul style="list-style-type: none"><li>• Use application software to format, edit, and manage professional documents. (letters, memorandums, and informal reports)</li><li>• Use business applications and information systems to find, collate, and present information to complete work tasks</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Obtain materials from the correct information systems</li><li>• Actively seek to increase proficiency with most frequently used software</li></ul>	<p><b>Knowledge:</b></p> <p>Possess advanced knowledge of the functions, concepts, and structures of:</p> <ul style="list-style-type: none"><li>• Common practices for computer components, software, and information tools to improve efficiency</li><li>• Business applications utilized by their customers</li></ul> <p><b>Skills:</b></p> <p>Perform the following system-related tasks:</p> <ul style="list-style-type: none"><li>• Use a variety of technology applications, business systems, and information tools</li><li>• Utilize social media</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Identify and share best practices to optimize the value of information tools</li></ul>	<p><b>Knowledge:</b></p> <p>Possess deep knowledge and expertise in best practices for use of computer components, application software, information tools, and design software (e.g. Adobe InDesign) to maximize efficiency.</p> <p><b>Skills:</b></p> <p>Perform the following system-related tasks:</p> <ul style="list-style-type: none"><li>• Use various computer applications to produce complex formal documents</li><li>• Use business and service systems to analyze data, extract information, and improve performance</li><li>• Analyze and cross-reference information in business systems to make decisions (e.g., forecasting, planning, scheduling)</li><li>• Generate and manage reports from software analytic engines</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Act as a mentor and problem-solver for colleagues experiencing systems issues</li><li>• Use systems to interpret information to improve processes</li><li>• Proactively make recommendations on system improvements</li></ul>

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

# CUSTOMER CARE AND RELATIONSHIP DEVELOPMENT

**Category:** Customer Retention

**Description:** Meets customer expectations with excellent customer service, adding value through networking, providing customers options, and resolving customer complaints. A critical element is ongoing relationship development, including managing expectations, organizing resources to address critical issues, and frequent follow-up to ensure customer satisfaction.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Possess knowledge of techniques and concepts to address:</p> <ul style="list-style-type: none"><li>• Customer interaction</li><li>• Customer expectations</li></ul> <p><b>Skills:</b></p> <p>Perform the following customer service related tasks:</p> <ul style="list-style-type: none"><li>• Conduct follow-up to ensure customer satisfaction</li><li>• Build rapport by recalling and referring to information of interest—both business and personal</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Interact well and respond to customer requests</li><li>• Provide prompt feedback to customer in a professional manner</li><li>• Respond to customer inquiries within the promised timeframe</li><li>• Foster relationship and provide valuable information to business counterparts</li></ul>	<p><b>Knowledge:</b></p> <p>Possess knowledge of techniques and concepts to address:</p> <ul style="list-style-type: none"><li>• Customer objections</li><li>• Customer complaints</li></ul> <p><b>Skills:</b></p> <p>Perform the following customer service related tasks:</p> <ul style="list-style-type: none"><li>• Manage customer complaints</li><li>• Read personality and communications styles and adapt personal communication accordingly</li><li>• Diagnose and solve issues with upset customers</li><li>• Leverage other departments with the dealership to support customer care</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Network in the industry by attending dealer-organized customer events</li><li>• Quickly develop rapport and trust with customers</li><li>• Take ownership of customer complaints even if not responsible, and follow up to ensure resolution</li><li>• Prepare action plans for non-problems as well; follow up on order execution</li></ul>	<p><b>Knowledge:</b></p> <p>Possess knowledge of techniques and concepts to:</p> <ul style="list-style-type: none"><li>• Maintain customer relationship throughout all stages of the sales cycle, and post-sale</li></ul> <p><b>Skills:</b></p> <p>Perform the following customer service related tasks:</p> <ul style="list-style-type: none"><li>• Anticipate customer needs</li><li>• Turn issues into sales opportunities</li><li>• Gain access to difficult-to-reach and high-level customers</li><li>• Leverage other appropriate resources to provide quick responses and best solutions</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• View oneself as part of a comprehensive team, providing complete care to the customer</li><li>• Possess excellent networking skills both in and out of the industry</li><li>• Employ critical thinking to pursue win-win solutions with upset customers</li></ul>



# ENHANCE CUSTOMER INTERACTIONS

**Category:** Leadership

**Description:** Understands and documents customer experiences through the full cycle of interactions, allowing the dealership to remove obstacles, improve communications, and improve each interaction with the customer. NOTE: It is dealer preference on the reporting structure for the customer experience; this may be a collaborative process with process owners, and may or may not be in Marketing.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of customers' experiences throughout all their interactions at the dealership, and is able to recognize opportunities for improvement.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Define customer interaction within a customer experience (e.g. field service, initial requests through invoicing and payment)</li><li>• Listen to customer input, both expressed and behavioral</li><li>• Recognize whether expectations can be met</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of each individual customer interaction with the dealership</li><li>• Reflect upon the negative and positive aspects of the experience</li><li>• Adopt the customer's point-of-view and mindset</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of how to:</p> <ul style="list-style-type: none"><li>• Document customer experiences and individual interactions to facilitate improvement activities</li><li>• Document perception gaps—gaps between customers' expectations and their perceptions of their experience</li><li>• Document transitions among dealer employee groups</li><li>• Document customer pain points</li></ul> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Establish a process of documenting customer experiences</li><li>• Identify customer segments that can be studied and documented as a group</li><li>• Collaborate with others to identify areas of improvement</li><li>• Create models of customer interactions that are easy to understand and interpret (e.g., journey maps)</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of acting on results of data analysis</li><li>• Capture all relevant information</li><li>• Avoid being caught in "analysis paralysis"</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of how to:</p> <ul style="list-style-type: none"><li>• Improve customer experiences</li><li>• Work with process owners and all dealer departments on improvement activities</li><li>• Leverage dealer procedures, personnel, facilities, and/or equipment toward improving the customer experience</li></ul> <p><b>Skills:</b></p> <p>Perform the following customer service related tasks:</p> <ul style="list-style-type: none"><li>• Coordinate improvement opportunities with dealership employees</li><li>• Facilitate sessions to determine steps to close perception gaps</li><li>• Socialize improvement plans</li><li>• Institute metrics to measure performance</li><li>• Provide follow-up with others involved in the improvement process</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of improvement activities that lead to better customer outcomes</li><li>• Drive culture changes at the departmental and individual level</li></ul>

# LEADERSHIP OF THE DEALERSHIP BRAND

**Category:** Leadership

**Description:** Constructs a brand management strategy that inspires trust in the dealership and builds loyal customers through positive brand associations over time. Implements marketing plans to enable the company vision and long-term strategy to grow and maintain brand equity through marketing techniques that increase the perceived value of the dealership.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Demonstrate familiarity with the requirements of the Cat brand and those of other Original Equipment Manufacturer (OEM) brands.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Ensure dealership communications comply with the manufacturer's brand standards</li><li>• Reinforce brand standards to all customer-facing personnel and all personnel that create customer-facing messaging</li><li>• Apply branded asset standards and the Caterpillar-approved supplier network for proper use of the dealership brand/distribution identity on exterior signage, dealership service vehicles, business forms and stationery, technician uniforms, and branded environments</li><li>• Share responsibility for the Key Performance Indicator (KPI) of brand awareness</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of Caterpillar and OEM brand standards</li><li>• Make use of marketing efforts to support Cat brand and those of other OEMs</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of the requirements of the Cat brand and those of other OEM brands, and can balance both requirements.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Work with dealership's rental store to ensure Cat brand and other OEM brands are in compliance</li><li>• Supervise employee recognition for supporting the brand</li><li>• Work with the dealerships on their representation of complimentary product brands the dealerships are adding to their brand portfolio to sustain business growth</li><li>• Be fully accountable for the KPI of brand awareness</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of balancing brand standards</li><li>• Establish, support, promote and defend the dealership's brand</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate mastery of knowledge of the requirements of the Cat brand and those of other OEM brands, and be highly proficient with strategies that can be applied towards establishing, supporting, and defending the dealership's brand.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Create dealership brand guidelines</li><li>• Build brand equity by ensuring all customer communications and sales contacts support the overall customer acquisition and retention strategy</li><li>• Create strategies around the "aspirational" Cat brand supporting the initial premium price</li><li>• Create advocacy and employee engagement with the dealership brand</li><li>• Create a brand portfolio strategy that is a complimentary extension of the dealership's core Cat-branded product and service offering</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of collaboration with OEMs towards development of brand standards</li><li>• Emulate a "brand champion" attitude</li><li>• Use dealer brand strategy to promote dealership and provide coherent customer messaging</li></ul>

# PROJECT MANAGEMENT

**Category:** Leadership

**Description:** Applies processes, methods, knowledge, skills, and experience to achieve planned objectives that are defined in terms of outputs, outcomes, or benefits.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of management strategies for standard projects.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Complete simple projects (e.g., basic Sales or Marketing campaigns, process improvements)</li><li>• Coordinate among team members and vendors</li><li>• Establish and maintain flow of information about initiatives</li><li>• Create clearly defined goals with timelines and resources which can be tracked</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of projects</li><li>• Participate in regular project and plan updates</li><li>• Be observant of potential opportunities for new projects</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of management strategies for complex projects.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Execute a project with multiple components or multiple projects simultaneously</li><li>• Use software to manage projects among the team and other stakeholders</li><li>• Establish an effective reporting system</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of functions for the development of project management processes</li><li>• Utilize good management techniques</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of management strategies for conducting projects and having others execute projects.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Study and improve a complex customer experience or issue</li><li>• Manage a project that involves multiple disciplines and inputs</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of collaboration with others executing projects</li><li>• Demonstrate good management processes with functions</li></ul>

# MANAGE DIGITAL MARKETING CHANNELS

**Category:** Leadership

**Description:** Manages the process of leveraging electronic media to promote products and services, while providing a consistent experience across electronic devices in order to attract, engage, and convert online prospects into customers. Forms of electronic media would include (but are not limited to): content marketing, influencer marketing, Search Engine Optimization (SEO), social media, online advertising.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Demonstrate familiarity with the latest digital marketing techniques.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>Send out a Caterpillar-provided email template to the appropriate customer base</li><li>Maintain an email list by managing deletions and additions</li><li>Execute digital campaigns from Caterpillar and other Original Equipment Manufacturers (OEMs)</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>Value the importance of maintaining professional communication with customers</li><li>Be adept and comfortable with working in a social media environment</li><li>Use marketing plan to drive marketing goals</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of the latest digital marketing techniques and remain up-to-date with current changes and advancements, and can apply them toward digital marketing tactics.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>Segment the customer database for marketing efforts</li><li>Create targeted lists</li><li>Use an outside vendor to create the dealership website and SEO strategy</li><li>Use email to drive sales</li><li>Create and execute digital marketing tactics</li><li>Analyze generic web-based platforms (e.g. Google Ad Words, Google Analytics)Create landing pages</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>Value the importance of up-to-date, customized communication with customers</li><li>Assume accountability for the number of qualified leads generated from digital marketing efforts</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate mastery of the latest digital marketing techniques, remain current, and can apply them toward a digital marketing strategy.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>Source one’s own email platform to conduct a behavioral-based campaign</li><li>Create user groups on social media to organize a community</li><li>Use marketing automation techniques to improve customer response</li><li>Design new marketing automation systems to ensure the dealership captures, evaluates, and executes proper lead management</li><li>Create and execute an effective digital strategy</li><li>Develop strategies based upon analysis of web-based platforms and testing</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>Value the importance of crafting cutting-edge digital solutions in a fast-paced, fast-growing platform</li><li>Be vigilant of new or emerging sources of digital communication that can be applied towards marketing opportunities</li></ul>

# MANAGE TRADITIONAL MARKETING CHANNELS

**Category:** Leadership

**Description:** Manages the process to deliver “push” marketing content to current and prospective customers through media including (but not limited to): in-person events, direct mail, print advertisements, newsletters, billboards, flyers, newspaper print ads.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Demonstrate familiarity with the execution and delivery of marketing campaigns and projects through traditional marketing techniques.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Arrange and conduct customer-facing and employee events</li><li>• Write press releases for public relations</li><li>• Acquire advertising (e.g., rent outdoor advertising)</li><li>• Follow style guidelines in all written communications</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of appropriate use of traditional marketing channels</li><li>• Execute marketing tactics within traditional marketing channels (e.g., print ads, outdoor ads, radio, television, direct mail, trade groups, etc.)</li><li>• Use marketing plan to drive marketing goals</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of effective execution and delivery of marketing campaigns and projects through traditional marketing techniques.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Collaborate with other departments to generate additional leads (e.g., sales referrals, bid leads)</li><li>• Organize customer/dealer networking (e.g., co-sponsor a charity event, trade shows)</li><li>• Take responsibility to manage the Key Performance Indicator (KPI) of participation rate</li><li>• Track the number of leads generated and how they are managed from generation to sale</li><li>• Support lead management strategies</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of collaboration towards common marketing goals</li><li>• Collaborate with other groups to design and execute projects using traditional marketing channels</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate mastery of effective execution and delivery of marketing campaigns and projects through traditional marketing techniques, and can apply them towards burgeoning marketing opportunities.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Design an effective strategy to address a marketing opportunity</li><li>• Manage, execute, and measure the initiative produced through traditional marketing channels</li><li>• Define lead management strategies</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of innovative use of traditional marketing channels</li><li>• Develop strategies to take advantage of traditional marketing channels</li></ul>

# 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><b>Knowledge:</b></p> <p>Demonstrate familiarity with management knowledge regarding assignment of projects/tasks, motivational strategies, evaluation of vendor work, and cost effectiveness.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Gather information from information vendors</li><li>• Provide clearly defined and visible leadership commitment to anti-bribery compliance</li><li>• Conduct appropriate due diligence on third parties and their activities</li><li>• Conduct a clearly defined and visible commitment to anti-trust compliance</li><li>• Conduct “buy” vs. “hire” decisions and monitor costs</li><li>• Engage vendors to perform appropriate work (e.g., graphic artists, print vendors, data compilation service, SEO vendors)</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of dealership vision and values</li><li>• Manage vendors who are supplying information and/or executing tasks</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate proficiency with management knowledge regarding assignment of projects/tasks, motivational strategies, evaluation of vendor work, and cost effectiveness.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Work with vendors to perform improvement services (e.g., ERP, CRM, SEO vendors)</li><li>• Retain vendors to stay aligned with dealer initiatives (e.g., maintain dealership website)</li><li>• Maintain vendor compliance with brand (e.g., Cat licensed merchandise vendor list, brand guidelines)</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of inter-organizational partnerships</li><li>• Manage vendors who are providing systems</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate mastery of management knowledge and be sought out for guidance to:</p> <ul style="list-style-type: none"><li>• Determine projects and tasks to assign to vendors</li><li>• Motivate vendors for results</li><li>• Measure cost effectiveness of the “buy” vs. “hire” decision</li></ul> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Work with vendors to perform creation of Key Performance Indicator (KPI) dashboards associated with services (e.g., Sales and Marketing CRM dashboard)</li><li>• Retain vendors to provide customized services (e.g., outbound contact center lead generation activities, NPI launch)</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of cross-organizational communication</li><li>• Manage vendors who need to understand the business requirements of the dealership</li></ul>

# MANAGE EVENT LOGISTICS

**Category:** Leadership

**Description:** Coordinates and organizes dealer customer events and trade shows to build customer relationships, display positively the dealer and Cat brand, generate sales leads, promote understanding of customer business issues through dialogue between customers and dealer staff, and facilitate positive customer experiences. Develops, manages and controls vendor contracts (e.g., promoter, venue, setup/teardown, refreshments, displays), recommends staffing, and proposes optimal events based on return-on-investment analysis.

The individual will:

## L1

### Knowledge:

Demonstrate familiarity with event management processes and required skills.

### Skills:

Perform the following management tasks:

- Contacts trade show organizers to register the dealership
- Contracts with vendors as required by trade show organizers and as needed to produce the trade show
- Communicates clearly with staff selected by management to participate in the trade show
- Consults with customer experience and brand management personnel to develop trade show environment
- Coordinates graphics, equipment and supplies (if needed), and marketing collateral
- Communicates clearly with staff participants for dealer events
- Arranges refreshments for dealer events
- Coordinates customer communication preparation and delivery
- Works within the budget established for the event

### Behaviors:

- Values the importance of dealership and Cat brand, and impactful customer experiences
- Manages vendors who are supplying services and/or executing tasks

## L2

### Knowledge:

Demonstrate proficiency with event management processes regarding assignment of projects/tasks, customer engagement strategies, and selection/evaluation of vendor work.

### Skills:

Perform the following event management tasks:

- Works with managers in sales, service and other marketing personnel to optimize staffing selections for trade shows and dealer events
- Works with sales to obtain and display the optimal equipment and supplies
- Works with marketing to create graphics and displays which promote the dealer and Cat brand
- Consults with customer experience managers to optimize customer interactions
- Organizes and supervises communications to customers, trade show/dealer event staff
- Supervises the creation of marketing collateral and promotional materials for the trade show/dealer event
- Provides input into the creation of a budget for any event

### Behaviors:

- Values the importance of trade shows/dealer events in creating, building and maintaining strong customer relationships

## L3

### Knowledge:

Demonstrate mastery of event management processes and be sought out for guidance to:

- Determine the appropriate trade shows to attend
- Determine the appropriate dealer events to calendar
- Create the event budget and return on investment analysis
- Assure completeness of vendors' work
- Recommend staff levels and suggested participants

### Skills:

Perform the following management tasks:

- Provides direction for the creation of graphics, displays and booth traffic
- Provides direction for the marketing strategy to draw customers to the event
- Guides sales and service managers in the selection of display equipment, tools and supplies

### Behaviors:

- Values the importance of positioning the dealership for success at trade shows/dealer events
- Values the importance of generating a positive return on investment at each event

# CONSULT WITH INTERNAL CUSTOMERS

**Category:** Planning

**Description:** Partners with other leaders and divisions within the dealership to integrate into a centralized marketing process in order to understand specific market and customer challenges and opportunities, while using data analysis to implement and co-own growth strategies.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of methods for gathering clear goals and objectives from internal customers.</p> <p><b>Skills:</b></p> <p>Perform the following consultation-related tasks:</p> <ul style="list-style-type: none"><li>Respond to specific internal requests based upon customer/ company feedback (e.g., addressing inbound call strategies, social media requests, creating a direct mail piece)</li><li>Consult with key executives to discuss and create marketing opportunities (e.g., potential offerings, distribution lists, retail strategies for brand support)</li><li>Design an impactful customer event or experience</li><li>Utilize Caterpillar marketing resources and materials (e.g., target segment promotion, branding materials) as well as any promotional funds Caterpillar may have available</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>Value the importance of good consulting practices</li><li>Listen carefully to internal customers</li><li>Ask probing questions to uncover needs and build consensus</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of methods for gathering ambiguous goals and objectives from internal customers through collaborative practices.</p> <p><b>Skills:</b></p> <p>Perform the following consultation-related tasks:</p> <ul style="list-style-type: none"><li>Create customer-focused initiatives (e.g., targeted marketing, services marketing, standardized procedures and training)</li><li>Work with departments to address findings from customer transactional surveys</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>Value the importance of collaboration with other divisions in fulfilling internal customer requests</li><li>Ensure the internal customer feels secure and appreciated through an effortless experience</li><li>Support alignment to ensure proper sales territory coverage</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate mastery of methods for gathering ambiguous goals and objectives from internal customers through collaborative practices, and can direct strategies towards solving problems and taking advantage of opportunities.</p> <p><b>Skills:</b></p> <p>Perform the following consultation-related tasks:</p> <ul style="list-style-type: none"><li>Determine market shares or customer experiences are below benchmarks from other dealerships and create an initiative to increase performance</li><li>Meet with Caterpillar industry representative to discuss ways to grow Percentage of Industry Sales (PINS) and bring Sales into the discussion</li><li>Drive fall business planning for the next fiscal and calendar year</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>Value the importance of taking advantage of marketing opportunities</li><li>Assume responsibility for providing the "voice of the customer" to ensure the perspective of customers is always considered</li></ul>



# STRATEGIC DEALERSHIP PLANNING

**Category:** Planning

**Description:** Leads a disciplined process to craft the dealership's long-term growth strategy through marketplace analysis, identifying priorities, determining desired outcomes and results, then activating change management methodologies.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Demonstrate familiarity with effective marketing strategies.</p> <p><b>Skills:</b></p> <p>Perform the following planning related tasks:</p> <ul style="list-style-type: none"><li>• Provide information on customer locations to assist the dealership in locating new branches</li><li>• Produce information on lost sales and participation rates</li><li>• Execute what the sales department requests</li><li>• Study competitor websites and publicly available information</li><li>• Create plans from strategies given to marketing by executives</li><li>• Provide "push reporting" for executives to make decisions</li><li>• Participate in brainstorming marketing plans/ideas</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of executive decision-making</li><li>• Continually seek improvements in the process of implementing a strategic plan</li><li>• Set plans based on information</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of effective marketing strategies.</p> <p><b>Skills:</b></p> <p>Perform the following planning related tasks:</p> <ul style="list-style-type: none"><li>• Oversee Caterpillar and other Original Equipment Manufacturer (OEM) programs</li><li>• Allocate time and resources to campaigns depending on their placement in the dealership's strategy</li><li>• Execute jointly planned sales department requests</li><li>• Organize the dealership's coverage strategy</li><li>• Create plans after consultation with executives to fit strategic objectives</li><li>• Facilitate marketing strategy sessions</li><li>• Consolidate/aggregate the input of others</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of a collaborative marketing effort</li><li>• Provide directional recommendations to executive leadership</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate knowledge of a well-developed, highly effective marketing strategy based upon opinions and advice solicited from other managers and other marketing team members.</p> <p><b>Skills:</b></p> <p>Perform the following planning related tasks:</p> <ul style="list-style-type: none"><li>• Develop marketing plan including all major strategic business initiatives</li><li>• Bring ideas "to the table" during strategic planning sessions</li><li>• Set the strategy with the sales department</li><li>• Take responsibility for defining the "addressable market" the dealership should cover</li><li>• Serve as the primary liaison between Caterpillar marketing teams and dealerships</li><li>• Create plans from strategic objectives marketing helped create with executive leadership</li><li>• Facilitate workshops development of innovative solutions and operational processes with peers</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of contributing to the executive decision-making process</li><li>• Have a "seat at the table" and be able to critically examine what is brought up</li></ul>

# PARTICIPATE IN CONTINUOUS LEARNING

**Category:** Professional Development

**Description:** Professional development items include awareness of changes and updates to industry knowledge, which include personal assessment, enrollment and completion of courses, certifications, and training to advance one’s career. Proactively investigates new perspectives, approaches, and behaviors, and takes steps to evaluate and improve performance.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Gain knowledge by attending trainings and conferences</p> <p><b>Skills:</b></p> <p>Perform the following development-related tasks:</p> <ul style="list-style-type: none"><li>• Conduct personal assessment using the company’s learning management system to track training and progress</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Participate in training in order to proceed on a personalized learning path</li><li>• Complete required learning assignments on time</li></ul>	<p><b>Knowledge:</b></p> <p>Describe how to proactively develop oneself in the appropriate products and industries</p> <p><b>Skills:</b></p> <p>Perform the following development-related tasks:</p> <ul style="list-style-type: none"><li>• Applies new technical and business information/knowledge to practical use</li><li>• Maintain fluency in applications, software and other tools</li><li>• Use a variety of learning resources from Cat, dealer, and third parties</li><li>• Identify inefficiencies and seek improvements</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Identifies individual challenges and seeks opportunities to grow</li><li>• Utilize outside resources (e.g., professional organizations, publications) to identify appropriate areas for learning</li></ul>	<p><b>Knowledge:</b></p> <ul style="list-style-type: none"><li>• Can describe the advancement process</li><li>• Articulates industry and product knowledge</li></ul> <p><b>Skills:</b></p> <p>Perform the following development-related tasks:</p> <ul style="list-style-type: none"><li>• Mentor new and inexperienced employees</li><li>• Performs workplace assessment</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Displays an open, curious, non-judgmental attitude regarding differences of opinion</li></ul>

# 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:

ADMINISTRATIVE	<a href="#">Systems Proficiency</a>
CUSTOMER RETENTION	<a href="#">Communication</a>
	<a href="#">Customer Care and Relationship Development</a>
LEADERSHIP	<a href="#">Enhance Customer Interactions</a>
	<a href="#">Leadership of the Dealer Brand</a>
	<a href="#">Project Management</a>
	<a href="#">Manage Digital Marketing Channels</a>
	<a href="#">Manage Traditional Marketing Channels</a>
	<a href="#">Manage Vendor Relationships</a>
	<a href="#">Manage Event Logistics</a>
PLANNING	<a href="#">Consult with Internal Customers</a>
	<a href="#">Strategic Dealership Planning</a>
PROFESSIONAL DEVELOPMENT	<a href="#">Participate in Continuous Learning</a>

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

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