

# Customer Experience Manager



# 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
ADMINISTRATIVE	<b>Systems Proficiency</b> Uses hardware, software, and other enablers effectively.	L2
CUSTOMER RETENTION	<b>Communication</b> Convey clear & effective verbal & written communication.	L3
	<b>Customer Care and Relationship Development</b> Meets customer expectations with excellent customer service by adding value.	L3
LEADERSHIP	<b>Enhance Customer Interactions</b> Understands and documents customer experiences through the full cycle of interactions.	L3
	<b>Leadership of the Dealership Brand</b> Construct & manage a brand strategy & implement plans.	L3
	<b>Manage Customer Feedback</b> Identifies general improvement opportunities based upon customer feedback.	L3
	<b>Manage the Customer Environment</b> Improves customer experiences based upon the physical and online environments.	L2
	<b>Manage the Customer Experience</b> Manage the interface with the customer.	L3
	<b>Project Management</b> Use processes/methods to achieve planned objectives.	L2
PLANNING	<b>Consult with Internal Customers</b> Determine internal challenges & opportunities.	L2
PLANNING AND PREPARATION	<b>Develop Training Materials</b> Designs learning solutions to support the needs of the business.	L2
PROFESSIONAL DEVELOPMENT	<b>Participate in Continuous Learning</b> This is a brief description of this competency.	L2

# SYSTEMS PROFICIENCY

**Category:** Administrative

**Description:** Uses hardware, 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:</p> <ul style="list-style-type: none"><li>• Hardware, software, and information tools (e.g., MS Office®, web browser, email)</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), etc.)</li></ul> <p><b>Skills:</b></p> <p>Perform the following system-related tasks:</p> <ul style="list-style-type: none"><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:</p> <ul style="list-style-type: none"><li>• Common practices for hardware, 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></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 hardware, software, and information tools 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 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></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>• Pro-actively 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 each 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>

# MANAGE CUSTOMER FEEDBACK

**Category:** Leadership

**Description:** Identifies general improvement opportunities based upon customer feedback, addressing specific customer concerns, and commencing with customer service recovery where needed. **NOTE:** It is dealer preference on the reporting structure for the customer experience; this may or may not be in Marketing.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Demonstrate familiarity with the forms of documentation, tools, and processes used to track customer feedback (e.g., transactional surveys) and be able to recognize improvement opportunities.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Identify where feedback is needed</li><li>• Support administration feedback efforts</li><li>• Verify feedback is accurate and unbiased</li><li>• Ensure feedback data cleanliness</li><li>• Compile aggregate data for customer experience improvements</li><li>• Coordinate with departments and individuals impacted by outcomes of documented feedback</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of meaningful, quality data</li><li>• Abide by documentation processes (e.g., timeliness) related to gathering customer feedback</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of the content and analytics behind customer feedback processes to facilitate improvement activities, and of how to address negative feedback.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Collaborate in addressing individual customer concerns</li><li>• Track follow-up activities to ensure corrective actions are applied</li><li>• Verify follow-up and issue resolution</li><li>• Conduct training on alert and resolution processes</li><li>• Discern what feedback is “unacceptable” on the part of the dealer</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of addressing identified customer concerns</li><li>• Communicate regularly with customer-facing personnel to implement customer service recovery</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate mastery of knowledge of the content and analytics behind customer feedback processes, and can apply them towards proactively identifying and implementing cost-effective improvement actions.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Lead brainstorming sessions with multiple departments to respond to issues identified by aggregated customer feedback</li><li>• Document suggested procedural changes or training needs</li><li>• Facilitate the implementation of suggested changes</li><li>• Incorporate feedback into experience design</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of addressing trends in issues identified in customer feedback</li><li>• Collaborate with others to institute change</li><li>• Think critically and creatively about effective improvement actions</li></ul>

# MANAGE CUSTOMER ENVIRONMENT

**Category:** Leadership

**Description:** Improves customer experiences based upon the physical and online environments in which they interact with the dealership. Such environments include (but are not limited to): stores, on the telephone, field service, web, and mobile.

**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 familiarity with how the elements of an environment (e.g. displays, signage, sounds, interactive elements) affect the customers' perceptions of their experience.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Ensure the environment is appropriate to the expected audience</li><li>• Identify all environmental and customer interfaces</li><li>• Observe customer interactions within the environment</li><li>• Document current practices with a focus on continuous improvement</li><li>• Follow brand guidelines</li><li>• Benchmark competitive and other vendors' storefronts or websites</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of how the environment affects customer satisfaction</li><li>• Champion visual and environmental cleanliness</li><li>• Seek opportunities to improve the customer environment</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of customer expectations in the environment, how they are formulated and influenced, and how they change over time.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Incorporate best practices</li><li>• Conduct focus group to generate ideas for improvement</li><li>• Utilize visual tools and resources</li><li>• Develop, organize, and deploy displays, point-of-sale tools, and signage</li><li>• Research customer behavior and act on results accordingly (e.g., monitor shopping cart abandonment)</li><li>• Test multiple customer navigation strategies and adopt what performs best</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of how perceptions are formed</li><li>• Research best practices</li><li>• Perform competitive analysis</li><li>• Obtain customer perception on attributes of the environment that are valued the most</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate mastery of knowledge of current environmental practices, as well as the gaps that exist between it and customer expectations, and apply this knowledge towards designing cost-effective improvements in the environment.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Train customer-facing dealer personnel on how to improve the environment</li><li>• Audit to ensure compliance</li><li>• Set internal expectations</li><li>• Integrate customer contact strategies with customer behavior</li><li>• Develop unique environments to correspond with offerings</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of implementing improvement actions</li><li>• Communicate vision and expectations at an individual level</li><li>• Enforce uniform standards across all dealer branches</li><li>• Research the appropriate environmental changes (e.g., layout, equipment, signage, appearance)</li></ul>

# MANAGE CUSTOMER EXPERIENCE

**Category:** Leadership

**Description:** Takes responsibility for designing the customer touch points to ensure the dealer is delivering effortless experiences that make customers feel appreciated and secure. NOTE: It is dealer preference on the reporting structure for the customer experience; this may or may not be in Marketing.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <p>Demonstrate familiarity with the tools and strategies utilized toward measuring the customer experience at the dealership.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Create a “day at the dealership” for important customer visitors</li><li>• Organize merchandising displays for maximum effectiveness</li><li>• Join key associations of customers</li><li>• Consult with the machine sales department on the new machine hand-off</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of customer satisfaction</li><li>• Observe customer behavior and craft improvements in the customer’s experience</li></ul>	<p><b>Knowledge:</b></p> <p>Demonstrate highly proficient knowledge of the tools and strategies utilized toward measuring the customer experience at the dealership and can apply those measurements toward improving customer experience.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Observe Parts Counter Advisors and suggest changes to operations</li><li>• Time how long a customer waits for parts after an order is placed and make recommendations for improvement</li><li>• Conduct focus group to generate ideas for improvement</li><li>• Observe Field Service Technicians for customer experience improvement ideas</li><li>• Record calls (where allowed) and evaluate customer-facing individuals</li><li>• Take responsibility for customer experience Key Performance Indicators (KPIs)</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of the customer experience in the dealership’s marketing efforts</li><li>• Aim to get the perception of the customer on general attributes they value the most</li></ul>	<p><b>Knowledge:</b></p> <p>Possess detailed insight into the level of satisfaction with all customers of the dealership, and can both apply and tailor improvements to every unique customer.</p> <p><b>Skills:</b></p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none"><li>• Recommend changes to the customer experience based on survey results</li><li>• Design strategies to improve customer experience based on customer satisfaction indicators</li><li>• Operate an inbound call center to answer the call and transfer to the right person within fifteen seconds</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>• Value the importance of adapting and responding to the dynamic needs of customers</li><li>• Analyze and evaluate the customer experience from start to finish</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><li>• Complete Project Management Certification</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>

# 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>

# DEVELOP TRAINING MATERIALS

**Category:** Planning and Preparation

**Description:** Designs learning solutions such as Instructor-Led Training (ILT) and assessments to support the needs of Caterpillar business units and learning end users.

The individual will:

L1	L2	L3
<p><b>Knowledge:</b></p> <ul style="list-style-type: none"><li>Identify the Caterpillar® development process for ILT, Web-Based Training (WBT), assessments or other learning solutions</li><li>Identify key points and relevant examples/materials</li><li>Identify relevant content development resources</li><li>Identify how to incorporate technology within training</li></ul> <p><b>Skills:</b></p> <p>Perform the following development-related tasks:</p> <ul style="list-style-type: none"><li>Design, create, and develop training materials to meet the needs of the organization</li><li>Apply Analysis, Design, Development, Implementation, and Evaluation (ADDIE) principles when developing learning materials</li><li>Develop material using consistent tense, grammar, and terminology</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>Participate in a basic needs analysis to determine learning outcomes</li><li>Work effectively with all roles in the content development team</li><li>Participate in industry and/or product group meetings during the development process</li></ul>	<p><b>Knowledge:</b></p> <ul style="list-style-type: none"><li>Describe different methods of blended learning and use different approaches to achieve learning outcomes</li><li>Describe the relationship between the learning outcomes, technical content, and performance measurement</li><li>Describe best practices for using technology within training</li><li>Determine relevant characteristics and target secondary learning audiences</li></ul> <p><b>Skills:</b></p> <p>Perform the following development-related tasks:</p> <ul style="list-style-type: none"><li>Confirm readiness of equipment, technology, and tools</li><li>Use different techniques to emphasize material</li><li>Develop detailed lesson plans</li><li>Use multimedia to reinforce and improve learning outcomes</li><li>Develop course support materials and documentation</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>Arrange for machine, engine, and other training equipment needed to meet learning outcomes</li><li>Work with the whole development team to select and develop appropriate instructional methods, strategies, and presentation techniques</li></ul>	<p><b>Knowledge:</b></p> <ul style="list-style-type: none"><li>Design course content that emphasizes key points, relevant examples, and uses additional materials</li><li>Discuss learning theories, instructional design strategies, and learning styles</li><li>Demonstrate how to incorporate technology within training and mentor others on technology</li></ul> <p><b>Skills:</b></p> <p>Perform the following development-related tasks:</p> <ul style="list-style-type: none"><li>Develop materials that are consistent across and between lessons and clearly communicate information</li><li>Analyze and select technologies and integrate options</li></ul> <p><b>Behaviors:</b></p> <ul style="list-style-type: none"><li>Prepare a FAQ to anticipate questions during the instruction</li><li>Pro-actively engage with the development team to test and develop new ideas for content delivery</li><li>Advocate and champion best practices when using media and technology</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> <ul style="list-style-type: none"><li>Gain knowledge by attending trainings and conferences</li></ul> <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> <ul style="list-style-type: none"><li>Describe how to proactively develop oneself in the appropriate products and industries</li></ul> <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>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 Dealership Brand</a>
	<a href="#">Manage Customer Feedback</a>
	<a href="#">Manage the Customer Environment</a>
	<a href="#">Manage the Customer Experience</a>
	<a href="#">Project Management</a>
PLANNING	<a href="#">Consult with Internal Customers</a>
PLANNING AND PREPARATION	<a href="#">Develop Training Materials</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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