

Marketing 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
CUSTOMER RETENTION	Communication Convey clear & effective verbal & written communication, for both internal & external audiences.	L3
LEADERSHIP	Lead Inside Sales Lead & manage an outbound sales organization.	L2
	Leadership of the Dealership Brands Construct & manage a brand strategy & implement plans to enable its development.	L3
	Manage Data Analytics Manage the process of turning data into actionable information.	L2
	Manage Digital Marketing Channels Manage the leveraging of electronic media to promote dealership products & services.	L3
	Manage the Customer Experience Manage the interface between the customer & the dealership to ensure customer appreciation & security	L3
	Manage Traditional Marketing Channels Manage the delivery of marketing content through traditional media to promote dealership products & services.	L3
	Manage Vendor Relationships Manage third party organizations' contracts, relationships, & performance, controlling costs & mitigating risks.	L3
	Manage Team Leadership Lead & manage a team with multiple marketing disciplines while retaining customer focus.	L3
	Project Management Manage products through established processes & methods to achieve well-defined, planned objectives.	L2
	Select Employees Select the best employees to join the team.	L2
PERFORMANCE	Systems Knowledge Use information systems to collect & analyze marketing data.	L2
	Consult with Internal Customers Engage in a dialogue with internal leaders & divisions regarding their marketing challenges & opportunities.	L2
PLANNING	Strategic Dealership Planning Collaborate with fellow leaders to craft the dealership's marketplace strategy by utilizing a disciplined process.	L3

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 basic 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 (e.g., emails, memos, presentations)• 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 (e.g., memo, email, phone call, face-to-face)• 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 (e.g., high level management, decision makers, customers)• 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, email, and audio/video conferences• Work effectively with different personalities across a variety of social and professional situations

LEAD INSIDE SALES

Category: Leadership

Description: Leads and manages an outbound sales organization. NOTE: Not all marketing departments include an Inside Sales Representative (ISR) team; ISRs may report through the sales department instead.

FOUNDATIONAL	ADVANCED	EXPERT
<p>Knowledge:</p> <p>Demonstrate familiarity with management strategies pertaining to inside sales teams supporting marketing objectives.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Generate leads for ISRs• Provide marketing collateral for ISRs• Manage customer sizes and assigned accounts for ISRs <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of sales leadership• Strive for collaborative relationship with sales• Look for opportunities to assist sales with customer identification	<p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of management strategies pertaining to inside sales teams supporting marketing objectives and is familiar with management strategies needed to manage an outbound telephone effort.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Oversee a customer contact center• Manage an ISR function to generate leads for machine sales• Contact customers who purchased competitive equipment to see if they considered the dealership• Oversee individuals who answer the online chat service for customers on the dealership's website• Deploy an outbound telephone-selling sales team <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of communication and feedback with customers• Lead and support on both conversations and coverage	<p>Knowledge:</p> <p>Demonstrate mastery of management strategies pertaining to inside sales teams supporting marketing objectives and of inside sales functions within marketing that pursue multiple target markets.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Have ISR team pursue diversified opportunities• Have ISR team pursue niche target markets• Establish an effective automated system of bringing new projects to ISR team <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of an effective sales team• Demonstrate effective sales leadership

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

MANAGE DATA ANALYTICS

Category: Leadership

Description: Manages the process of turning marketing data into actionable information.

FOUNDATIONAL	ADVANCED	EXPERT
<p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of basic data analysis tools and how to effectively deploy them.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Use Opportunity Lead Generation Analyzer (OLGA) to determine and disseminate information on sales leads• Research bid lists and send to the sales group for follow-up• Use data to develop and drive a marketing plan• Establish a marketing Key Performance Indicator (KPI) dashboard <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of data-driven decision making• Oversee the use and deployment of basic data analysis tools	<p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of advanced data analysis tools and how to leverage them to generate sales opportunities.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Create business intelligence from “Big Data”• Use data analysis to provide associated products and services to customers purchasing at the Parts Counter• Identify customers doing business with competitors with high opportunity for the sales group• Use marketing KPIs to drive dealership decisions <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of actionable information based on analyzed data• Champion “data cleanliness” and continual updating of data	<p>Knowledge:</p> <p>Possess insight into the skills of a highly proficient data analyst team, and can properly utilize the team toward providing advanced data services.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Deploy a data analyst team to provide advanced data services• Analyze differences in geographical market share and develop a strategy to address it• Meet with Sales on a monthly basis to review sales strategies• Use data analysis to predict what customers will buy with a current purchase• Use marketing KPIs to drive dealership strategies <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of collaboration towards a common goal• Model and promote a culture of data-driven decision making

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>Knowledge:</p> <p>Demonstrate familiarity with the latest digital marketing techniques.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">Send out a Caterpillar-provided email template to the appropriate customer baseMaintain an email list by managing deletions and additionsExecute digital campaigns from Caterpillar and other Original Equipment Manufacturers (OEMs) <p>Behaviors:</p> <ul style="list-style-type: none">Value the importance of maintaining professional communication with customersBe adept and comfortable with working in a social media environmentUse marketing plan to drive marketing goals	<p>Knowledge:</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>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">Segment the customer database for marketing effortsCreate targeted listsUse an outside vendor to create the dealership website and SEO strategyUse email to drive parts salesCreate and execute digital marketing tactics <p>Behaviors:</p> <ul style="list-style-type: none">Value the importance of up-to-date, customized communication with customersAssume accountability for the number of qualified leads generated from digital marketing efforts	<p>Knowledge:</p> <p>Demonstrate mastery of the latest digital marketing techniques, remain current, and can apply them toward a digital marketing strategy.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">Source one's own email platform to conduct a behavioral-based campaignCreate user groups on social media to organize a communityUse marketing automation techniques to improve customer responseDesign new marketing automation systems to ensure the dealership captures, evaluates, and executes proper lead managementCreate and execute an effective digital strategy <p>Behaviors:</p> <ul style="list-style-type: none">Value the importance of crafting cutting-edge digital solutions in a fast-paced, fast-growing platformBe vigilant of new or emerging sources of digital communication that can be applied towards marketing opportunities

MANAGE THE 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.

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

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>Knowledge:</p> <p>Demonstrate familiarity with the execution and delivery of marketing campaigns and projects through traditional marketing techniques.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Arrange and conduct customer-facing and employee events• Write press releases for public relations• Rent outdoor advertising <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of appropriate use of traditional marketing channels• Execute marketing tactics within traditional marketing channels (e.g., print ads, outdoor ads, radio, television, direct mail, trade groups, etc.)• Use marketing plan to drive marketing goals	<p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of effective execution and delivery of marketing campaigns and projects through traditional marketing techniques.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Collaborate with Sales to choose a method of generating additional leads from bid leads• Co-sponsor a charity event attended by many customers• Take responsibility to manage the Key Performance Indicator (KPI) of participation rate• Track the number of leads generated and how they are managed from generation to sale <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of collaboration towards common marketing goals• Collaborate with other groups to design and execute projects using traditional marketing channels	<p>Knowledge:</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>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Design an effective strategy to address a marketing opportunity• Manage, execute, and measure the initiative produced through traditional marketing channels <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of innovative use of traditional marketing channels• Develop strategies to take advantage of traditional marketing channels

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.

FOUNDATIONAL	ADVANCED	EXPERT
<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• Engage vendors to perform appropriate work (e.g., graphic artists, print vendors, data compilation service, SEO vendors) <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 vendors’ work accuracy, completeness, and cost effectiveness.</p> <p>Skills:</p> <p>Perform the following management tasks:</p> <ul style="list-style-type: none">• Work with vendors to perform improvement services (e.g., ERP, CRM, SEO vendors)• Retain vendors to stay aligned with dealer initiatives (e.g., maintain dealership website/ 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• 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">• Work with vendors to perform creation of Key Performance Indicator (KPI) dashboards associated with services (e.g., Sales and Marketing CRM dashboard)• Retain vendors to provide advanced or customized services (e.g., outbound contact center lead generation activities, NPI launch) <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

MARKETING TEAM LEADERSHIP

Category: Leadership

Description: Leads, builds and manages a dynamic and adaptable team within multiple marketing disciplines while remaining customer-focused.

The individual will:

L1	L2	L3
<p>Knowledge:</p> <p>Identify and evaluate skills of marketing team members and allocate projects to them based on their competency and capability.</p> <p>Skills:</p> <p>Perform the following leadership related tasks:</p> <ul style="list-style-type: none">• Process requests for meetings and entertainment• Analyze requests that are forwarded to the Data Analyst• Ensure marketing team members are using voiced customer needs <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of good time management• Capture the “voice of the customer” and relay such to marketing team members	<p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of strategies toward coaching and counseling individual marketing team members to improve their competency and capability.</p> <p>Skills:</p> <p>Perform the following leadership related tasks:</p> <ul style="list-style-type: none">• Coach team members on how to address a request by sales group• Perform Return on Investment (ROI) analysis on marketing projects• Counsel with outside vendors (e.g., graphic artist) on information to obtain from Sales• Assign marketing team members to be a liaison with each division for communication purposes <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of raising marketing team performance• Manage to Key Performance Indicators (KPIs)	<p>Knowledge:</p> <p>Demonstrate a keen understanding as to what each department “brings to the table,” and can facilitate and coordinate multiple disciplines toward achieving a common goal.</p> <p>Skills:</p> <p>Perform the following leadership related tasks:</p> <ul style="list-style-type: none">• Bring together a team meeting to brainstorm a potential marketing solution• Collaborate with colleagues at other dealerships to gain insights and perspective• Organize launch of new product <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of collaboration of multiple disciplines towards resolving business issues• Serve as a “change agent” to align all aspects of the dealership to a strategy

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.

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

SELECT EMPLOYEES

Category: Leadership

Description: Selects the best employees to join the 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">• Recruitment• Screening• Interviewing• Assessment• Coordination <p>Skills:</p> <p>Perform the following employee selection related tasks:</p> <ul style="list-style-type: none">• Establish reporting rights and responsibilities• Provide leadership with information for the selection and interviewing of new employee applicants• Determine competitiveness of dealership compensation and benefits packages• Execute 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 employees• Act 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 hires• Screen applicant lists effectively• Customize and create interview questions• Conduct selection interviews• Deploy personality profiling/testing as needed for the dealership• Develop 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 process• Provide a comfortable and efficient interview atmosphere and process• Model professional correspondence practices throughout the employment 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 plan• Develop/groom individuals for future assignments• Reach out to available labor pools• Collaborate an effective on-boarding process <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of the selection and retention of employees• Establish a good working relationship with labor pools• Provide the basis for a positive work environment that fosters employee retention

SYSTEMS KNOWLEDGE

Category: Performance

Description: Uses information systems to collect and analyze marketing data.

FOUNDATIONAL	ADVANCED	EXPERT
<p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of how to use basic systems in support of marketing.</p> <p>Skills:</p> <p>Perform the following system related tasks:</p> <ul style="list-style-type: none">• Use the dealership's Dealer Business System (DBS) to look at customers by region and by industry to determine marketing tactics• Use Universal Commercial Code (UCC) filings (if available) in correlation with DBS data to understand customer competitive purchases and to develop target account strategy• Use DBS to look at new customers coming into the dealership• Oversee Customer Relationship Management (CRM) system maintenance• Disperse leads from Caterpillar, online, and/or event sources <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of the use of technology to support the marketing effort• Be comfortable dealing with large quantities and categories of customer information	<p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of how to use advanced systems in support of marketing.</p> <p>Skills:</p> <p>Perform the following system related tasks:</p> <ul style="list-style-type: none">• Have marketing use Opportunity Lead Generation Analyzer (OLGA) to generate a report of actionable repairs• Conduct marketing campaigns using online parts sales information• Maximize social media channels to increase customer engagement and to provide customer support• Create dashboards of critical marketing metrics <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of the use of technology to address marketing challenges• Research new systems as technology evolves	<p>Knowledge:</p> <p>Demonstrate highly proficient knowledge of current systems in support of marketing and is up-to-date with current changes and advancements.</p> <p>Skills:</p> <p>Perform the following system related tasks:</p> <ul style="list-style-type: none">• Create a business case to deploy advanced analytic software• Source and deploy predictability software <p>Behaviors:</p> <ul style="list-style-type: none">• Value the importance of remaining current and resourceful• Allocate financial resources to obtain and deploy new, innovative marketing tools

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

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.

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

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