

# Caterpillar

## ISR Manager Performance Breakthrough Training Event

Caterpillar's Marketing & Sales Performance Group will be hosting an **ISR Manager Performance Breakthrough** workshop for Machine Sales ISR Managers, Power Systems ISR Managers and Product Support ISR Managers. The training event will be held in Malaga, Spain October 30<sup>th</sup> and 31<sup>st</sup> immediately following the Dealer Exchange. This customized workshop is designed to provide ISR Managers with the tools they need to effectively execute and manage a team of Inside Sales Reps. The one-day training starts at 1:00 p.m. on Tuesday, October 31<sup>st</sup>. We will cover topics such as:

- How to raise the productivity and performance of your ISRs
- Techniques for designing profitable territories
- Setting activity and revenue goals and how to manage those objectives
- Creating a comp plan that motivates

There is **no cost** for the workshop (only your travel) and it will be held at the Caterpillar facility in Malaga

See below for a course outline with more detailed information on the content covered in the training. Please register online.

Regards ~

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**ISR MANAGER Performance Breakthrough Workshop - Course #44216**  
**October 30 – 31, 2018**

## Caterpillar Facility in Malaga, Spain

<b>Course Name</b>	ISR Manager Performance Breakthrough Workshop
<b>Course Objectives</b>	<p>This workshop is designed to help raise the productivity and performance of an ISR team. After this one-day workshop, the ISR Manager will be able to:</p> <ul style="list-style-type: none"> <li>• Build an effective ISR Business Plan</li> <li>• Design profitable ISR and PSSR territories</li> <li>• Coach ISRs on prospecting and growing their accounts</li> <li>• Manage the relationship between PSSRs and ISRs</li> <li>• Establish high-performance objectives and goals</li> <li>• Monitor progress through activity and revenue measurements</li> <li>• Create compensation plans that motivate and manage</li> <li>• Coach ISRs to drive performance and promote development</li> </ul> <p>Criteria: Current best practice as documented in Implementation Guidebooks</p>
<b>Course Summary</b>	<p>This workshop is designed for ISR managers who have an existing or planned ISR group. During the workshop, the manager will learn how to design effective territories, set revenue goals, activity objectives and compensation plans. Managers will also learn how to manage to their plan through quarterly reviews and coaching.</p> <p>Primary Instructor: John Dieseth – Business Performance Group</p>
<b>Prerequisites</b>	Review the “ISR Excellence Fundamentals” Implementation Guidebook
<b>Duration</b>	1-1/2 days
<b>Investment</b>	<b>Caterpillar will cover the cost of tuition and meals for a manager to attend the training. Your dealership will be responsible for travel, and lodging.</b>

## ISR Performance Breakthrough Workshop Outline

Introductions and goal setting  
Benchmarks on ISR efficiency

### *Territories*

Creating breakeven points for PSSRs and ISRs  
Assigning accounts to PSSRs and ISRs  
List cleansing need and methodology  
Prospecting lists, techniques and expected results  
Cash, marketing and accounting accounts  
Revenue balancing – 20% accounts 80% revenue – and revenue goals

### *Account Maintenance*

Qualifying accounts  
Assigning accounts back to a PSSR  
Handling deleted or unable to contact accounts  
Communication within the organization:

- Management
- PSSRs
- Machine Sales
- Parts

### *Setting Objectives*

Establishing ISR objectives for:

- Number of calls/day
- Revenue
- ISR development
- Special projects
- Progression
- Lead generation

On-going training and development

### *Progress Monitoring and Reporting*

Using and maintaining CRM

Measuring revenue, POPS, PINS and customer feedback

Capturing feedback within the dealership

Quarterly reviews

Coaching to assure you hit the plan

### *Compensation*

Compensation alternatives, managing to the plan

Expanding the program based on success, number of accounts, target market

### *Building Your Plan*

Work on your dealership's business development plan

Presentation of plans/Discussion/Wrap-Up and Close