

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 Melbourne, Australia September 11, 2018 prior to 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 8:00 AM on Tuesday, September 11th. 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 Melbourne.

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

Regards ~

Traci Shepley

Senior Account Manager - Sales Development

Business Performance Group

PO Box 7750

Urbandale, IA. 50323

Office (877) 521-3215

Cell (515) 249-1341

Erech Virden

CATERPILLAR®

Sr. Sales Management Process Consultant

Marketing & Sales Performance

Office Ph: (309) 494-5832

Mobile Ph: (309) 678-4458

virden_h_erech@cat.com

ISR MANAGER Performance Breakthrough Workshop - Course #44216

September 11, 2018

Caterpillar Facility in Melbourne, Australia

Course Name	ISR Manager Performance Breakthrough Workshop
Course Objectives	<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">• Build an effective ISR Business Plan• Design profitable ISR and PSSR territories• Coach ISRs on prospecting and growing their accounts• Manage the relationship between PSSRs and ISRs• Establish high-performance objectives and goals• Monitor progress through activity and revenue measurements• Create compensation plans that motivate and manage• Coach ISRs to drive performance and promote development <p>Criteria: Current best practice as documented in Implementation Guidebooks</p>
Course Summary	<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>
Prerequisites	Review the “ISR Excellence Fundamentals” Implementation Guidebook
Duration	One day
Investment	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.

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
Wrap-up and review



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