

Title: COVID-19 – Interacting with Business Partners and Customers

Introduction: The GIPC (*Global Industry Practices Committee*) was assigned to coordinate input from various companies on the safeguarding of sales interacting with business partners and customers as the COVID-19 re-opening process moves forward. We have identified areas for consideration and best practices that have been implemented in a collective sampling of operations.

With the sudden global impact of the COVID-19 pandemic, the electronic components authorized channel partners have been dealing with numerous unexpected challenges associated with the pandemic. Following the peak of infections, a recovery process will begin, and changes will take place across the supply channel and many of the items in this document may become permanent in day-to-day operations.

It is planned to continue to monitor additional areas for consideration and best practices and revise this document as new items are identified.

Design: It is the intent of this SME group (Subject Matter Expert) to provide areas for consideration and best practices for how manufacturers, distributors and manufacturer's representatives in the electronic component industry can safely and effectively adapt their selling organizations in response to the Covid-19 pandemic. The content in this document is derived from a combination of remote customer engagement policies and strategies along with guidance regarding face to face selling activities and other external stakeholder meetings.

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Subject Matter Expert Group member contributors and reviewers:

This subject matter expert (*SME*) working group encompassed various ECIA member companies and included inputs from non-member companies.

COVID-19 Areas for Consideration and Best Practice List:

- The safety, health and well-being of an organization's employees, customers and other external stakeholders are the primary consideration when planning for re-opening and normalization of business activities.

- Due to the rapid rate of changing circumstances and the vastly different regional approaches to containment and mitigation of COVID-19, consideration should be given to developing a dedicated Task Team or Internal Advisory Group to follow recent developments and make policy recommendations.
- Continue using remote collaboration tools such as Zoom, Google Meet, Skype, and MS Teams as the primary and safer alternative to in-person meetings:
 - Adapt selling organizations to conduct highly effective remote meetings.
 - Have pre-defined meeting objectives, provide sales force with predetermined agendas and participate roles.
 - Provide written scripts for advancing through calls.
 - Focus on training the selling organization to be as comfortable working remotely as they are face to face.
 - Stick to the meeting agenda/purpose to accomplish objectives and avoiding being side-tracked.
- Define the value and requirements of remote meetings to customers and stakeholders:
 - Design reviews with enhanced tools for engineering discussions.
 - Establish standard protocols for commercial topics and business review meetings.
- Identify and adapt performance metrics for sales roles which include remote working criteria:
 - Define appropriate customer engagement activities.
 - Utilize a CRM or similar tool to measure productivity and engagement as a means of identifying best practices for remote work.
- Develop and distribute internal guidelines that specify what types of selling and customer support activities are appropriate for in-person meetings.
- Strict adherence to local state, county and other regional laws and government orders regarding approved activities, social distancing measures, gathering size and other precautions are to be followed.
- Create written guidelines that can be shared with external stakeholders that clearly defines expectations for business meetings and customer engagement policies.
- Communicate to and formally train those employed in customer facing roles on internal guidelines and policies. Include role specific details for various sales and support positions.
- Prior to any in-person meetings achieve mutual understanding of all social distancing protocols to be followed, meeting attendees, setting, and whether the other parties attending have any written policies that need to be adhered to. These written documents may include visitor questionnaires, waivers, or other policies.

Best Practices for Face to Face Meetings:

- Perform temperature checks the morning of any in-person meetings. Current CDC recommendations is to stay home for a reading above 100.4 degrees.
- Any employee exhibiting signs of illness including fever, dry cough, or shortness of breath should not travel or join in-person meetings.
- Frequent hand washing and sanitizing both prior to and post all face to face meetings.
- Always maintain physical distance protocols.

- Eliminate physical contact including handshaking, exchange of business cards, etc. to the greatest extent possible.
- Face masks covering mouth and nose are strongly encouraged for all parties in meeting attendance.
- Ship samples and literature directly from warehouse to the customer without requiring personal delivery.

Various links to CDC reopening guides:

- <https://www.cdc.gov/coronavirus/2019-ncov/community/office-buildings.html>
- <https://www.cdc.gov/coronavirus/2019-ncov/community/general-business-faq.html>
- <https://www.cdc.gov/coronavirus/2019-ncov/community/guidance-business-response.html>