**Pre-Training Agenda For Distributor Training With Rep / Supplier**

This worksheet provides guidelines to make training sessions interactive, interesting and efficient. The ECIA Independent Manufacturer Rep Council has compiled them based on the results of an extensive survey of ECIA members. Use them with an eye towards improving the experience for all involved and resulting in:

* High level of engagement from the distribution sales team during trainings
* Increased communication with customers
* Increase demand creation value-prop with customers/suppliers
* More accountability to joint and target customers from trainings
* Increase joint calls with FAEs/Supplier Reps

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| **Initial Communication** |
| **Completed** | **Action** | **Outcome** |
|  | 1. Purpose of meeting…NPI Training on specific product / Discuss applications & Vertical markets.
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|  | 1. Suggested format for training.
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|  | 1. Any specific market or product
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|  | 1. Who will attend from Distributor (I/S, O/S, Prod Mgrs., Management?)
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|  | 1. Will Manufacturer attend or Rep only?
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|  | 1. If Rep only – who all will attend? (Distribution Mgr., Prod Mgr., O/S team).
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|  | 1. How many lines will you present?
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|  | 1. Target Date
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|  | 1. What time? (morning, Lunch meeting?)
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|  | 1. Allotted amount of meeting time. 60 min / 90 min?
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|  | 1. F2F or Virtual Meeting?
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|  | 1. Joint effort to provide target markets, accounts, and applications. In advance of the meet appropriate for the training.
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| **Training Agenda Suggestions** |
|  | 1. Consistent standardized template to be used
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|  | 1. List Topic / Products you want to train on
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|  | 1. Key Features / Benefits
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|  | 1. Customer friendly presentations / Prepared Links
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|  | 1. Have appropriate literature, samples, demo’s
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|  | 1. If possible, demonstrate how the product fits with other specific products the distributors markets.
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|  | 1. Have a few leading questions prepared to help them ask the right questions when in front of customers.
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|  | 1. Help provide questions to ask the customer to sell additional complimentary products.
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|  | 1. List of target markets for the products being presented.
	1. These markets should be specific to this territory
	2. Please focus on NPI that is registerable with the “local market application” as the focus.
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|  | 1. Review the DR program for the training summary slide to make sure all salespeople know the specific qualification requirements for the registration program (e.g. min $, length of DR, etc)
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| **Prior to Training** |
|  | 1. One week prior to the training date you will need to forward a copy of the training presentation to the branch PM for review.
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|  | 1. Suggested format for training, one or two slides per product category with the following information included.
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|  | * 1. What is it and how does it work
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|  | * 1. Key features and benefits
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|  | * 1. Suppliers position in the market i.e. global leader or late to the market etc.
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|  | * 1. The distributor’s stock position and supplier pricing competitiveness
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|  | * 1. Competition: who they are and their strengths and weaknesses.
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|  | * 1. Markets and Applications
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|  | 1. Final copy of the presentation to be sent in advance of the training session
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|  | 1. Determine if there will be a quiz and awards. Let them know ahead of time that there is a Quiz.
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| **List of Target Customers** |
|  | 1. Training should include a list of target customers.
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|  | 1. Customers who design, build, and buy in the territory preferred.
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|  | 1. Do not include customers that manufacture/ buy outside of territory unless local distributor can be compensated.
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|  | 1. OEMS that are in the territory and use local CM’s can be included.
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|  | 1. Allow 10 minutes to discuss target customers that the Rep and Distributor will make calls together on.
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|  | 1. Both Rep / Supplier and Distributor should come to meeting with their list of target customers to discuss.
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| **Joint Responsibility: Advance, During & After** |
|  | 1. Targeted customer opportunities are sent to or presented to the customers identified during training session.
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|  | 1. Have results from previous training meetings to review action items
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|  | 1. Feed-back results could be shared with supplier.
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|  | 1. Enter registrations
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|  | 1. Undivided attention during training sessions - be interactive and ask questions
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|  | 1. Mutual accountability for follow up on action items, i.e. mutually agreed upon identified opportunities, planned calls.
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