



Basic Territory Management

Course Description:

TM 101 is the 1st of a series of three courses for territory management. 101 is aimed at proficiency. Many paths lead individuals to territory management. This course will level-set learners towards the role. It will teach the basics of dealer management, territory strategy, communication and OEM/Dealer relationship management.

Format: Live Course, 2 days

Tools:

Connect 360° Assessment Tool will be utilized prior to course and at 30-, 90- and 180-days post-course. Scores will be used to demonstrate improvement and also to compare to other team members within the same company and other TM's from other companies in same and like industries.

The Connect Difference:

1. The traditional academic model aims for learners to **know** things. Connect learners are expected to **do** things. Each course has three PO's (Performance Objectives). These are three things the learner needs to be able to **do** to be successful in their role.
2. All Connect OEM courses are built around the premise that the dealer is not your customer, they are a partner in distribution. Dealers don't need to be sold to. Dealers need to be educated, equipped, and motivated. That enables them to sell to the customer.

Performance Objectives:

Upon successful completion of to course, learner will be able to:

1. Perform accurate evaluations of mature dealers and dealer prospects.

- a. Utilize all available tools to evaluate performance of mature dealers. Evaluation should consider life-stage of dealer, geography and seasonality.
- b. Utilize all available tools to make business case for adding one dealer prospect over another in an open market.
- c. Communicate findings to OEM as a business case.

2. Construct and execute a plan that will improve mature dealers and recruit dealer prospects.

- a. Utilize all available tools to communicate business case to prospect dealers to win their partnership and commitment.
- b. Propose and implement initiatives to improve the performance of underperforming dealers. Measure, track and report improvement results to sales leadership.
- c. Complete dealer onboarding to ensure timely transition from prospect to high-performing dealer.

3. Actively manage relationship between OEM and dealers.

- a. Be a peer and trusted business advisor to dealer principal.
- b. Collect feedback from the field and deliver to leadership in an easily understood manner.
- c. Communicate new programs to dealers for easy adoption.