



Learning Objectives for Sales & Customer Service Employees Industrial Distribution and Related Sectors

Industrial distribution is a major employment sector, with more than **100,000 industrial distribution companies employing 3.3 million people** across the U.S. and Canada and contributing more than 5% of total GDP.

Although not well-known, industrial distribution is a unique business model in which industrial product manufacturers use the distribution channel to serve and sell to industrial users. The distributor works in partnership with the supplier manufacturer and offers important related or value-added services to strengthen supplier and customer relationships in a highly competitive marketplace.

In the large and very diverse industrial distribution sector, several specific positions (most often but not always titled inside sales representatives, customer service representatives and outside sales representatives) **make up more than 15% of the total workforce**. These jobs offer good wages, good working conditions and good ladders for advancement, but too few potential employees know about or are prepared for these good jobs.

Filling these positions with capable people is vitally important to industrial distributors, and **demand for these positions is expected to exceed 150,000 annually** as the economy recovers and Baby Boomer retirements escalate. But competition for skilled and capable employees will be fierce.

Candidates interested in opportunities specific to industrial distribution will have an edge on the competition by developing the knowledge and skills outlined in the **Industrial Distribution Sales and Customer Service Learning Objectives**.



Industrial Distribution Sales and Customer Service Learning Objectives A Note on Methodology

The Industrial Distribution Sales and Customer Service Learning Objectives Matrix outlines the **knowledge and skills new or transitioning employees need to successfully join an industrial distributor** in a sales or customer service position.

The Learning Objectives identify and differentiate knowledge and skills. In addition there are three categories of necessary knowledge and skills: **General Business, Sales and Customer Service, and the Industrial Distribution Business Model**. The Learning Objectives do not include higher level, specific product and technology knowledge and skills. Industrial distribution is a large and diverse sector covering sub-sectors including industrial equipment, electrical components, chemicals and plastics, plumbing and heating supplies, etc. No potential employee can become knowledgeable about products and technologies across this spectrum.

The training and education about the specific products and technologies necessary to be a high-value employee will usually be provided by or through the employer or someone will choose a specific sub-sector to target in their education.

The Learning Objectives were determined through a process beginning with a compilation and review of a number of knowledge and skill assessments done over the past 10 years.

For more information about industrial distribution and ICP, visit:

www.IndustrialCareersPathway.org

or contact:

Industrial Careers Pathway

info@industrialcareerspathway.org

+1.312.516.2100



General Business

Knowledge/Understanding

- Understand and apply business ethics
- Understand basic finance principles
- Understand basic accounting principles and practices
- Know finance and accounting roles in a business
- Understand basic principles & practices of operations mgmt.
- Understand basic principles and practices of e-commerce
- Understand basic concepts of quality
- Understand basic concepts of organizational behavior
- Understand basic labor relations issues
- Understand body language

Skills/Abilities

- Has basic business computer skills, including able to use common business software and enter and retrieve information in a computer system
- Able to perform basic math operations
- Able to use a calculator for more advanced calculations
- Able to figure averages
- Able to convert from one unit to another (metric conversion)
- Able to apply basic business statistics
- Able to communicate & interact professionally and effectively - internally & externally
 - In person
 - By phone
 - In writing - letters, memos, e-mails, business materials
- Able to respond to customer inquiries in person, by phone and in writing
- Able to listen effectively and ask questions to obtain needed information and identify needs
- Able to gather information and conduct research, including online research, from multiple sources
- Able to analyze data and information to make decisions, incl. comparing info. from different sources
- Able to evaluate options and alternatives
- Able to summarize information
- Able to use standard decision-making tools
- Able to present information and solutions logically and effectively
- Able to read and interpret labels and directions
- Able to properly record information
- Able to verify correctness and completeness



General Business, continued

Skills/Abilities

- Able to explain procedures
- Able to route materials properly
- Able to prepare a flexible weekly plan
- Able to manage time effectively
- Able to use goal setting techniques
- Able to make an effective presentation
- Able to facilitate team and small group meetings
- Able to speak to small groups
- Able to speak to large groups
- Able to establish & maintain constructive working relationships
- Able to participate in brainstorming



Sales & Customer Service

Knowledge/Understanding

- Understand principles of selling
- Understand effective sales techniques
- Understand basic marketing principles
- Understand telemarketing
- Understand negotiation, where and how it can be used
- Understand sales management concepts and processes
- Understand human motivation and behavior

Skills/Abilities

- Able to identify prospective customers
- Able to follow up on sales leads
- Able to use the vocabulary and terminology of the trade
- Able to use effective sales techniques
- Able to prepare, set up and conduct a sales presentation
- Able to present products and services
- Able to demonstrate products and explain product features
- Able to make customers aware of new/related products, promotions
- Able to recommend a product to meet customer need
- Able to apply pricing structures
- Able to estimate or quote prices, terms and delivery dates
- Able to answer questions about product availability and credit
- Able to negotiate prices and terms
- Able to follow up on quotes in a timely manner
- Able to present value add services and relate them to customer needs
- Able to effectively close a sale
- Able to provide products/services per agreement/purchase order
- Able to process and prioritize customer transactions
- Able to inform customers of price/cost changes
- Able to consult with client after sale, resolve problems and provide support
- Able to express written or verbal appreciation for an order
- Able to explain cancellation and return policy and procedure
- Able to maintain a product or catalog library
- Able to monitor open orders



Industrial Distribution Business Model

Knowledge/Understanding

- Understand the role of the wholesale distributor
- Understand ID operations
- Understand ID job roles
- Understand ID career paths
- Understand inventory management and control
- Understand warehouse and shipping practices
- Understand logistics and transportation methods
- Understand purchasing policies and practices
- Understand expediting
- Understand industrial marketing
- Understand value add
- Understand coding for products, vendors, suppliers
- Know the manufacturing process
- Know product lines, sources and technical benefits
- Know the role of professional organizations

Skills/Abilities

- Able to speak the correct industrial language
- Able to communicate with internal technical specialists
- Able to communicate about industrial technology and applications
- Able to maintain supplier and customer files and records
- Able to monitor stock levels and reorder merchandise
- Able to track inventory and product availability
- Able to verify warehouse inventory
- Able to evaluate customer inventory, warehouse and stocking procedures
- Able to arrange and direct delivery of product
- Able to fill and expedite orders
- Able to communicate with carriers & freight lines
- Able to determine and record product size & weight
- Able to find information in standard technical resources
- Able to read drawings and spec sheets
- Able to match products to engineering drawings
- Able to establish customer product specs and expectations
- Able to evaluate solutions
- Able to identify best product to meet customer needs
- Able to estimate costs of materials, services, supplies
- Able to calculate/estimate customer ROI
- Able to calculate and verify price



Industrial Distribution Business Model, continued

Skills/Abilities

- Able to understand and address engineering questions
- Able to answer questions about products
- Able to answer questions about product use
- Able to present product interrelationships
- Able to present product features and benefits
- Able to understand market demand and economic conditions
- Able to monitor market conditions
- Able to follow industry trends
- Able to monitor product innovations & competitor activities
- Able to buy products from manufacturers
- Able to plan, assemble and stock product displays