

Meeting Minutes:
ISBM Educators' Consortium
January 19, 2000

In this document:

- Participant program/issue comments.
- Discussion of plans for Ingersoll-Rand's "Intercepted Decision Quality" (IDQT) study.
- Discussion of plans for Allen Stines's Marketing Skills Inventory project.
- Appendix 1: Draft IDQT questionnaire and flow chart.
- Appendix 2: Allen Stines's draft list of business marketing competencies.

Action items from the meeting:

- Investigate developing a "marketing dictionary," starting with ISBM's value and pricing framework and cycling through input from all consortium members.
- Investigate developing a best practices/case history database.
- Meeting participants to report their thoughts on the IDQT project and indicate if they will try their own intercepted decision quality studies.

Introduction—Specific issues/objectives of this meeting

- General objectives:
 - Identify best practices in business marketing education – set the stage for benchmarking
 - Gather insight from the community on what's working, "discoveries in process", etc
 - Assist one another in designing/critiquing/developing
 - Hear from resources pushing the envelope
 - Help in setting ISBM education agenda
 - Identify and explore ways to deal with key issues...
- From our 6/16/99 meeting:
 - Examine new trends in marketing – directions for marketing education
 - This became the focus of the January 2000 joint ISBM/CBIM meeting.
 - Measuring the ROI of Marketing/Marketing Education to the firm
 - Beginning Pilot Development and Implementation of IDQT project with Ingersoll-Rand
 - Defining Marketing Skills Inventory
 - Building on work gathered – Allen Stines's Research/Development Project of Business Marketing Skills Inventory

Meeting participant introductions and updated program information

“What’s going on in marketing education, what are the issues you are facing, and what should we focus on?”

Ralph A. Oliva

Moderator and ISBM Executive Director

- From the university perspective, the trend in marketing education is all e-business. We pull from a large portfolio of material for our courses, but it’s almost an impossible job to keep up with an environment constantly changing.
 - The demand for trained e-business marketers greatly outstrips the supply. Marketing people are hot. To quote *USA Today*’s issue this morning, “Forget the geeks and finance people. Marketeers are the new rock stars of the Internet.”
 - Educators recognize that they need to cooperate rather than compete.
 - IBM says it needs to hire 30,000 e-business consultants annually over the next few years. Universities are producing one-tenth that many.
 - An IBM grant is helping to fund the Universal Library Project at Carnegie-Mellon University (www.ulib.org) where e-business training materials uploaded from many schools will be available for download for private use.

Gary S. Vastola

Director, Marketing Programs, Xerox Corp.

- We have 85,000 employees worldwide.
- Our biggest marketing training challenge now: moving from a direct selling model to a multifaceted approach to the market, and training salespeople to be marketeers.
 - Big question: What courses should we deploy?
 - Is distance learning an option? That’s appealing to me because my purview is marketing strategy and education in developing markets, such as Latin America, where the market needs to see that distance learning tools now are a lot different that they were a decade ago.

Ralph Oliva comments: The definition of distance learning is very fuzzy; no one definition applies.

- Caliber Learning Network, Inc. (www.caliber.com) offers live Internet broadcast capabilities for distance learning.

Elaine J. Harris

Director of Learning, Corporate Strategic Marketing, Honeywell

- We link e-business with our marketing training. I do not think most companies combine e-business and marketing the way we do.
- Our program includes:

- an annual one week program at Northwestern (Kellogg), which is not extensively customized
- upcoming value and pricing course to be taught at our site by Irv Gross/ISBM. The course has the appeal of directly affecting bottom-line results.
- upcoming competitive intelligence course taught by ISBM, to help launch our competitive intelligence network.
- training linked to our “Six Sigma” quality program and the “Six Sigma-Plus” program for non-operations people.
- entry-level “green belt” programs: for sales, and “growth green belt” for new product achievement.
- “market customer research” training is our “black belt track.”
- Our Marketing Learning Plan manual outlines the steps for professional assessment, development, and resources/courses available to employees.
- We assess how comfortable staffers feel about their competencies and the training.
- We always look for success stories and best practices to promote among the business units to align marketing and growth objectives.
- Any data sets we can find about the value of training will be helpful to us.

Mary Ann McCullough

Manager, Corporate Marketing, PPG Industries

- We have had six to seven courses from ISBM tailored to our case histories over the last two years.
- Employees and business teams attend from around the world.
 - Some employees attend courses elsewhere.
- A big priority for PPG: starting the discipline of marketing planning.
 - We’re looking at a University of Pittsburgh course on the subject; our people who’ve taken it praise it.
 - We’re concerned that such training courses could leave people moving in their own directions, creating turmoil in the organization.
- Taking our courses to Europe raises cultural issues; our European units need European course content.
 - Balancing diversity with the need to have everyone achieve a comparable knowledge level.

Ralph Oliva comments: ISBM is extending its network overseas.

- European courses are nearly ready in cooperation with INSEAD.
- 60-70% of content is similar to ISBM’s 16-course portfolio.
- The trick is not ensuring content quality, but coordination to develop a common global language of marketing.
- We do have contacts in Australia and Asia (Hong Kong, Singapore) but our priority is Europe. We can move in Australia quickly.
- Being market-specific is important. For instance, people expecting to enter the China market would want a professor teaching from the Chinese market perspective out to the wider world, rather than teach the Pacific perspective looking into China.

Gary Vastola comments: You could use the power of academics and companies to develop a “marketing dictionary.”

Ralph Oliva comments: That’s a great idea. As a start we could take the terms from our value delivery framework, which is the spine of our courses. We could develop the dictionary on the Web using the Xerox DocuShare™ format, which Xerox offers to us.

Mary Ann McCullough resumes:

- Customer value and the value chain are important training objectives for us. We’ve been doing it well.
- Branding is still a hot issue for us, such as in product naming. Customers keep asking us for help. But we’re spread thin in our ability to train people in the subject. Who are good organizations that can help, internationally too?

Elaine Harris comments:

- Branding is a big issue for us due to the AlliedSignal/Honeywell merger.
- We’ve started working with Lippincott & Margulies; they charge a very reasonable price.
- But in general, these consultants like to work on the logos, the cosmetics.

Ralph Oliva comments: Raj Strivastava (now at Emory University) can speak to the financial impacts of good and bad branding. Have you invited in him to consult?

Mary Ann McCullough resumes: We know where our mandate is for the PPG brand, but we need to rein in the chaos of maverick branding efforts. For example, one unit came up with a brand, “Zebra Link.”

Ralph Oliva comments:

- There are good naming services, but branding is more than just naming.
- Create a taxonomy of parent brand and sub-brands, linked to product benefits.
 - The Doblin Group, in Chicago, helped us at Texas Instruments (my previous employer), and helped Xerox too, in branding work.
 - We also used the Naming Center successfully at TI.
 - Maybe we should address these critical tactics in a branding course.

Robert W. Elmore

Marketing and Sales Excellence Manager, BP Amoco Chemicals

- Our company has had success having a seasoned sales warrior take marketing to our sales people. He has been highly credible.
- Amoco Chemical worked with several leading consultants to compare its training procedures to the rest of the chemical industry.
 - Our industry has done a poor job of being customer focused. Very product focused.
 - Research indicated that our customers liked our products, but wanted us to work them to develop products they needed.

- We took two sales/marketing people out of each of nine business units. For nine months we worked on being more customer focused, resulting in our “Marketing Excellence” program. I personally have trained more than 1,300 people globally with this program, a great success.
 - The Marketing Excellence manual has seven training modules in segmentation, positioning, etc.
 - We keep it simple, emphasizing two principles.
 - The customer does not care how much we know, but knows how much we care.
 - Marketing excellence is “the relentless pursuit of customer satisfaction for the sake of greater profits and profitability.”
 - Now, with the British Petroleum merger, Amoco business units have been merged into BP units, BP people ask how one of our units achieved a 16% revenue gain.
 - The Marketing Excellence manual serves both the one-day and three-day courses.
 - Other companies have asked if they can use the manual.
 - The newly merged company is reviewing whether to share it.
 - Sharing the manual would speak well for the company’s reputation.
 - The program includes two modules:
 - One-day overview of the seven modules, for the cross-functional groups that support marketing and sales; basically the entire company.
 - Three-day course for the sales and marketing people and the cross-functional teams that include them. They focus on the problems in their businesses. We tailor programs to Europe, Asia-Pacific, and North America.
- I do the training, the most exciting thing being my exposure to all 19 BP Amoco Chemical business units, and I get to see the results. For example, all 36 technical people in a Chicago session said they wanted the three-day program. It’s not typical for tech people to want such immersion. What a change in culture! We have developed a common language for the organization anywhere in the world.
- BP Amoco people do all the training, providing credibility, confidence, and a private environment where we can be honest with each other.
 - We strive for intra- as well as inter-company results. Salespeople should be aware of what operations people need to be successful—accurate forecasts, etc.
 - We keep adding success stories to the Marketing Excellence manual, to prove to people that the program works.
 - For example, one case lists the market opportunity, background situation, what happened, the business results, the marketing excellence principles applied, and whom to contact for more information about best practices.
- Everyone at BP Amoco will be trained, from CEO on down.
 - Classes will mix many different types of people: technical, sales, marketing, etc.
 - Training is face-to-face so people can ask questions and interact.
- We have taken Marketing Excellence to some customers, and some of them have asked us to teach this course in their plants. So have suppliers, our ad agency for example.

Mary Ann McCullough comments: We also have a one-day overview course. Currently we emphasize it for technical people. Not to make them experts, but make them more comfortable with marketing.

Virginia Tucker

Director, Executive Education, Penn State

- On distance learning:
 - BP Amoco's experience seeking face-to-face interaction shows a limitation of distance learning.
 - The distance learning decision too often is made to save money, even if it's not the best approach for learning.

Gary Vastola comments: We've successfully used interactive distance techniques for distance learning at Xerox via the Internet, video conferencing, etc. You can combine a number of techniques.

Nirmal Pal (IBM) comments: At IBM, we have an orientation for new people. We put several modules of it on CD-ROM for them to study in advance. They get a combination of distance and face-to-face learning.

Elaine Harris comments:

- Some technologies build interactivity into distance learning. Intellexis International (www.intellexis.com) offers such a software package, for example.
- We're looking at a ten-CD package—"The Marketing Series" from Intellexis—that IBM uses as a course.

Virginia Tucker resumes:

- Penn State's Executive Programs works with organizations to improve effectiveness, through open enrollment programs, courses such as those co-sponsored with ISBM, and joint ventures, such as with National University in Singapore.
- 50% of our business, and growing, is custom programs, particularly in areas of marketing and managing growth. We have lots of ongoing relationships with organizations.
- A key objective with customers: "How can we help your organization develop people who become your internal consultants?"
 - We need to be consistent with the culture of the organization, know the language of the organization.
 - Our role is get organization management to ask the right questions.
- At some of the companies we work with, education is not a big priority. Our challenge becomes getting training beyond just the senior level, getting it to the workgroup levels.

Ralph Oliva comments: The issue of building credibility is important. We could develop a success story database online, appropriately sanitized but built on real business-to-business situations.

Gary Vastola comments: Use a best practices program.

- We categorize best practices by techniques, programs, processes, or solutions. It's a very consistent format.
- List subjects you can drill into to access related support materials.
- We have a professional writer interview employees, such as salespeople, who have a best practice story to tell. We want to take the writing off the shoulders of the person who did it.

Charlotte A. Ros

Sales Education Representative, Georgia Power/The Southern Company

- We're concerned about branding issues; Southern Company, a utility holding company, merges many brand identities.
- We maintain "Southern Company College" for executive training. We sell courses to utilities in emerging markets worldwide.
- We do not teach pure marketing courses, but a series of sales education programs.
 - Company is repositioning its sales force, training to serve different types of customers and different types of buying styles (e.g., price buyers).
- Different marketing managers have different attitudes toward training. One, for example, says, "If you don't know marketing, you shouldn't be in the marketing department in the first place."
- For the last three years, we've been trying to develop a marketing skills inventory, but it was too academic and hard to understand. It did not clearly indicate actions to take.
 - We need marketing job descriptions, that people are comfortable with, as well as skills inventories.
 - We don't need a big thick book, but a way of identifying what skills we're missing.
 - We've been successful with the sales department, which wants to teach customer focus to the marketers, and how to roll out new programs supporting sales strategies.

Ralph Oliva comments: A federal government study of more than 20,000 federal managers identified the fundamental axes of leadership (See http://www.cpol.army.mil/train/acteds/CP_14/appm.html) in a three-page document. If we could get something like that in business marketing, and did that in just a few Web pages or sheets of paper, that could help us all in planning.

The assumption of pre-existing marketing knowledge is faulty in business-to-business marketing where technical knowledge, not formal marketing skills, is the prime requirement. At Texas Instruments, less than 10% of the 2,000 or so people with the word marketing in their titles had actually taken a marketing course. Having some technical knowledge is imperative, so most of the marketing training tends to occur after you've joined the marketing department.

Allen Stines (Penn State) comments: Two management concepts are relevant here:

- “Competency space management” is the process of matching specific competencies to job descriptions. You can track changes over time with a database.
- “Person-based compensation” is based on skills possessed, according to the competency matrix.
- GM might have done some work in this area, but the handful of consultants looking at this have not cooperated in building the process and have not published anything yet.

Elaine Harris: Such tools are adopted for team management, using competency inventories to build teams.

Allen Stines: Engineering companies use competency inventories, to support building the virtual teams far-flung projects require. The biggest problem is that older engineers resist using the technology.

Nirmal Pal: Consultants use similar methods to build their teams.

Gary Vastola: Consultants also use Lotus Notes to build teams.

Ralph Oliva: The “Power Steering” software from Cambridge Interactive (<http://psteering.com>), where our conference speaker Doug Smith is a board member, provides team collaboration on the Web. It has many automatic features, which can reach out and tie to a skills database, so you bring the right knowledge to bear just as it’s needed. This could be one of the answers to the distance learning question.

Mark Stoebner (Shell Chemical): Livelink software (www.opentext.com/livlink/) is another collaboration tool. And one of our managers has described Learnlinc (www.learnlinc.com), a distance learning software tool, as a “Net meeting on steroids.”

Nirmal Pal: Another option: the mix of transcript, slides, and audio reporting a conference such as IBM used with a major e-business conference last year.

Mark Stoebner

Training Manager, Learning Development, Shell Chemical, America

- Our purview includes all disciplines, not just sales and marketing.
- We partner with the Customer Fulfillment Center of Excellence. Their focus is clearly understanding the sales and marketing focus of the organization. They create courses, and our job is to grow and institutionalize that knowledge.
- We created the “Customer Market Management Process” and a set of tools for collaboration. But the tools got ahead of the process, knowledge, and understanding. We wound up teaching about tools with just a little process.
- Now we take a global marketing approach for U.S. managers, to get over the cultural hurdles.
- We are teaching marketing in an environment of good customer relationships with a product-focused perspective.
 - Commodity chemicals

- We intend to be the key supplier to a few major customers, and then serve smaller customers.
- We have training targets, such as supply chain management and product differentiation. The supply chain course covers e-commerce as a supply chain management tool.
- A couple of years ago we defined a set of job-based competencies and a Web-based database.
 - To link competencies to the company's 5,000 job descriptions in a manageable format, we created "job family templates" within specific disciplines. Keeping it simple—one or two pages—and high level.
 - Key tasks for the job.
 - Five key competencies required for the job.
 - It's a tool to *start* the conversation between an individual and the supervisor about the job and what it takes to be promoted.
 - The program puts a lot of emphasis on self-assessment, assessment by others, and training.
- Our biggest challenge in sales and marketing training: Shell Chemical is smaller worldwide, with fewer people selling, so we need to develop multiple delivery media.

Ralph Oliva: One thought has been combining training for people from several companies as specific, shared needs arise. We cannot run on-site courses for just a few people in a company.

David Cranmer (National Institute of Standards and Technology): You could fill the extra seats with people from smaller companies.

Nirmal Pal

***Director of Special Projects, Consulting Group, IBM Global Services
(to be Director of Penn State's e-Business Research Center in February 2000)***

- Whatever the marketing training in years to come, e-business development, delivery, and content will play a big role.
- IBM Global Services Consulting Group, providing consulting to customers, is now IBM Business Innovation Services.

Sanford Schulert

Director of Marketing Communications, BP Amoco Chemicals

- In my experience mentoring marcom people in the chemicals industry, I hired only people with chemistry degrees. I wanted marcom people comfortable with science and the intellectual inquiry for which scientists are trained. We could team them marketing.
- Our technologists are eager for marketing training. They feel very vulnerable in a business environment, and recognize that their jobs and the who enterprise depends on being customer oriented.

David Cranmer

Manager, Industrial Marketing Systems, National Institute of Standards and Technology, Manufacturing Extension Partnerships

- The government's NIST extension program started with shop floor technology transfer, expanding from there to business management issues.
- I manage the industrial marketing practice for the program.
 - 60 full-time staff in the business-to-business marketing practice in the field.
 - Emphasis on training nonmarketers and practitioners in marketing.
 - One-day course in industrial marketing basics.
 - Three-day course in industrial marketing essentials for marketing practitioners, to get them up to speed. We provide structured interview guides to suggest the right questions to ask a firm's management about its business.
- I also manage our e-business product line.
 - 300 information technology people scattered throughout 40 offices.
 - My job is to make sure technology is not divorced from business issues.
 - Program started with Y2K technology issues.
 - Program for e-business is evolving
 - Also looking at licensing Web-based courses and workshop courses on e-business.
- We work with ISBM to modify ISBM courses for small manufacturers.
 - First course will be in new product development, a stage-gate process course Bob Cooper has adjusted for smaller manufacturers.
 - Value and pricing strategy is on the horizon.
- We also work with Interbrand Gerstman+Meyers (www.gerstmanmeyers.com) on our own branding issues and our graphic standards, to coordinate what has been a "tribal confederation."

Issue: Developing a common language for marketing

Robert Elmore: Apropos of job descriptions and standards, at Amoco Chemical we trained the human resources department in the Marketing Excellence program.

- Then we rewrote the job descriptions for all sales and marketing related jobs to incorporate the Marketing Excellence program language. "You cannot say enough about the benefits of having a common language."
- We now train our companies to use Marketing Excellence language as part of everyone's job objectives.

Ralph Oliva: Having a common language throughout the firm is critical.

- A common language should reach out to more than just marketing people.
- We're considering creating a course for CFOs to build language bridges. In terms of e-business, brick-and-mortar firm CFOs need to think as their dot-com competitors do—in terms of venture, scale, and growth—rather than quarterly profit.

Gary Vastola: You can provide hot links on the Web from your marketing dictionary to related course materials.

Allen Stines: Courses such as Amoco's Marketing Excellence program could be taught to suppliers, so they do a better job for you, their customer.

Robert Elmore: We do not give our courses to suppliers, but we do work with them—particularly our supply partners—to boil the fat out of the supply chain and reengineer the value flows so everyone wins.

Nirmal Pal: E-business allows everyone in the supply chain to see prices at all tiers. That information drives prices, and subsequently costs, down.

Ingersoll-Rand and the IDQT Research Project *(Intercepted Decision Quality Test)*

Ralph Oliva:

- Ingersoll-Rand's training is named "Performance Pathways." It includes marketing, sales and customer service "pathways."
 - Research by Dr. Roger Best indicated the company's training needs start with:
 - value and pricing
 - segmentation, targeting, and positioning
 - Phase 1 includes five activities:
 - ISBM seminars on value and segmentation
 - Summary toolkits and frameworks on paper and on the Web
 - Access to "drill down" workshops
 - Build awareness and a community of practice with I-R "Business Marketers' Newsbrief" newsletter.
 - IDQT project.
- Background to IDQT study developed with Prof. Bill Rothwell of Penn State.
 - A simple approach to assessing the impact of training. "At the end of the day, what do you want to do? What marketers look for is not training, but changed behavior and better decisions."
 - After delivering a course, I-R and ISBM will in time send a "quick pulse" questionnaire to course participants asking (draft questionnaire appears in Appendix 1). They can respond by phone, e-mail, or fax.
 - Brief Introductory Memo
 - 1. Have you recently encountered or intercepted any decisions which relate to the material which was taught in the class you attended?
 - 2. If yes, how many?
 - 3. Were you able to use the tools and techniques you learned in class to improve the outcomes of these decisions? If not, why?
 - 4. Estimate the probability that the changed decisions you were involved with will be implemented -- %

- 5. Please estimate the economic impact – positive or negative – of the changed decisions. Please consider:
 - cost savings
 - increased sales
 - improved margins
 - increased efficiencies
 - any other effects
 - In your best estimation, what is the dollar value of the improved decisions, for the next 12-month period?
- 6. Any other inputs/comments?
- Although primitive, this approach avoids the practical impossibility of trying to have control groups for the exact same decisions. A reasonably conscientious estimate of the course impact is better than anyone has now, Rothwell said, encouraging us to give this a try.
- Status as of mid-January:
 - Questionnaire in final draft
 - Phone response system just completed
 - Data gathering structure still in process
 - With okay from Ingersoll-Rand will deploy survey before February, repeat every 6-weeks, implement for all courses
 - Ongoing tuning of concept
 - Decision on rollout by 3Q00

Gary Vastola: We could set up a subcommittee of noncompetitors to share the project.

Mary Ann McCullough: I'd have no problem participating if the topic were right. I can take this program right back to PPG people who've taken a course. "I love this tool." I am also looking for material for our corporate learning site on our intranet.

Virginia Tucker: Any evidence of training efficacy is good to have.

Mark Stoebner: We have involved procedures for assessing course effectiveness. But IDQT sounds simple, and can be integrated into our coursework. The one problem is that the wording sounds too academic.

Ralph Oliva: Perhaps we can build a database of results, names disguised, so we can share the collective results of this research with all ISBM members. One thing that is not yet clear is how often we send the questionnaire. The appropriate timing might differ by type of decision, the company, etc.

If you want to test this in your environment—with an ISBM course or any other course—let me know. Any indications that we can get a handle on this will get us closer to answering the big question.

Elaine Harris: The questionnaire might lead to misinterpretation, because managers who take a course might not be in decision-making roles for that topic. Technical people in a

marketing course, for example. The issue for them is whether the course helped in the *execution* of a decision.

Skills Inventory Research

A study of the competencies desirable in business-to-business marketers.

Allen Stines

Penn State Ph.D. candidate, Workforce Education & Development

- Study designed to generate a flexible, compact set of professional competencies that define the ideal business-to-business marketer. “A list that’s useful to practitioners and not just gathering dust on the shelf.”
 - Concept is similar to the idea behind the federal government’s Leadership Effectiveness Framework document.
 - Possible uses:
 - recruitment and selection
 - assessment
 - training
 - team construction (portable competencies)
 - succession
 - strategic planning
 - American Institute of Certified Public Accountants uses a “competency assessment tool” (CAT) to analyze a job candidate response to questions, comparing them to a database of 40 competencies distributed across four categories.
 - Andersen Consulting maintains a big, and confidential, competencies database.
 - Individual company competency databases are held confidential
- Study characteristics.
 - Compact set of professional competencies.
 - Industry neutral; generic enough to be used across a variety of industries.
 - Future-oriented, forecasting the competencies needed in five years. The oft-used critical incident technique of mapping competencies based on experience might not be able to keep pace with fast-changing fields such as marketing.
 - Identify knowledge, skills, abilities (innate skills), and attitudes—not just skills alone. A draft list appears in Appendix 2, below. Not job descriptions, but person descriptions.
- Research model:
 - Literature review of 500 articles; spot recurring themes.
 - Interviews with faculty members to clear up definitional problems
 - Design research instrument
 - Focus group will identify issues, scope
 - Delphi panels will collect information from practitioners, stakeholders (senior managers) and educators.
 - Data analysis
 - Final report

Elaine Harris: We already have something like this at Honeywell.

Ralph Oliva: Skills will differ by job and by level in the organization. We will want to list three levels of proficiency for each skill: awareness, practitioner, and expert.

Virginia Tucker: Don't just ask people about the future. Explicitly assess the skills needed now, then ask how those will shift over the coming years.

Also, you could relabel your section on "management acumen" to "business acumen."

Ralph Oliva: We should not separate e-business skills out as a separate list. Otherwise we will stall this project in the past. Five years from now there will not be a distinction; marketing will be all e-business.

Nirmal Pal: You can ask how new technologies will impact processes and requisite skills.

Mary Ann McCullough: We need a list of competencies for working within the organization and its culture.

Also, I would like to use the results to develop checklists for my specific needs, to make sure I don't miss anything in filling a job in, say, channel management.

Several participants debate: You could drop general skills, like ability to communicate, which every good employee needs. Those are too general.

On the other hand, communications skills are essential for business marketers who must sell the marketing concept in nonmarketing environments. The ability to communicate internally is critical.

Apparent group consensus: Enthusiastic support and a desire to look at revised list of competencies before commencing the Delphi phase.

—Minutes recorded by Bob Donath, Bob Donath & Co., Inc.

Appendix 1

Draft IDQT questionnaire and flow chart

[to be added]

Appendix 2

Allen Stines's draft list of business marketing competencies.

Prepared by:

Allen C. Stines
Ph.D. Researcher
Penn State University
409 Keller Building
University Park, PA 16802

Phone (814) 862-8844
Fax (603) 720-0701
E-mail: allen1@psu.edu

Working session

A study of the competencies
(knowledge, skills, abilities and
attitudes) desirable in Business
Marketers in the year 2005

Area

1

Business-to-Business Market Management

1. Value.
Understand the concept of value and recognize the potential for value creation. Diagnose sources of value both inside and outside the firm. Analyze and manage the value-chain.
 2. Market research /market assessment.
Identify and understand the customer base and its needs. Build perspective on industry, market, and competitive environment.
 3. Market segmentation /Value-based segmentation.
Understand and apply the techniques and different models involved in segmentation, with the goal of understanding how groups of customers with common behaviors and needs can be addressed.
 4. Targeting.
Understand and apply techniques that enable the identification and selection of markets to be addressed.
 5. Positioning.
Understand and apply techniques that enable a firm to differentiate their offerings from their competitors'.
 6. New product development.
Understand and implement a process for building total offerings which address the target segment.
 7. Pricing.
Develop value/pricing strategies.
 8. Market communications.
Understand and implement an integrated process for communicating offerings to targeted segments.
 9. Distribution channels
Determine optimal distribution channels and manage these channels so that value can be maximized.
 10. Sales management.
Understand and implement a process for:
 - 1) executing the marketing plan through the sales force.
 - 2) hiring, training and compensating sales personnel.
 11. Customer relationships.
Build and nurture strong customer relationships.
 12. Inter-business relationships.
Create and manage both buyer-seller and buyer-supplier relationships (eg. JIT II).
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13. Brand equity (Brand strategy and management)
Understand and implement the procedures for building brands which create positive short and long term economic effects in the marketing process.
14. Process management

Area

2

Business-to-Business Marketing Talent

This area is concerned with the "essence" of a business market manager. This group of professional competencies will be the most difficult to put into words.

The following is not a list of competencies but qualities that may be associated with a set of competencies.

1. Creativity.
Ability to think "out of the box"
2. Empathy
Ability to understanding needs and wants
3. Active listening
4. Insight
5. Articulation
6. Courage

1. Technology savvy
Demonstrate technical competency in using computers.
 2. Problem solving
 3. Strategic market management planning
 4. Data analysis (Marketing engineering??)
Select and use appropriate data analysis and decision making tools to mine through data
 5. Intelligence gathering
 6. ROI of marketing efforts
Determine the return-on-investment of marketing efforts
 7. Forecasting (Marketing engineering??)
(Modeling/data visualization)
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Area
4

Leadership

1. Interpersonal skills Oral/written communication skills
 2. Foresight /vision
 3. Lifelong learning
(Ability to continuously learn and grow from professional development and past experiences)
 4. Flexibility
(ability to adapt to a changing environment)
 5. team building
(group dynamics, facilitation)
 6. Diversity
(sensitivity to diversity issues, appreciation of diversity in a global economy)
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1. Diffusion of innovation.
Promote and nurture the innovative process within the department or business unit.
 2. Negotiating skills
 3. Customer orientation
 4. Financial management
 5. Management controls
 6. Planning and evaluating
Clarify and focus on organization mission, objectives and goals
 7. Entrepreneurial/ intrapreneurial spirit
 8. Awareness of business environment
 9. Appreciation of knowledge capital
 10. Ethics
 11. Project management
Manage people and resources with the assistance of technology
-

Appendix

A

Trends affecting Business-to-Business Marketing

This section identifies competencies that stem from emerging trends

1. E-business.
Understanding and managing the process of mobilizing technology tools such as the World Wide Web to enhance and/or transform the marketing and business process
 2. Global markets.
Understanding and managing the processes for marketing across countries, customs, cultures and currencies.
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Contact information

For more information about this study, please feel free to contact:

*Allen C. Stines
Ph.D. Candidate,
Workforce Development
The Pennsylvania State
University
409 Keller Building
University Park, PA
16202-1304
E-mail: allen1@psu.edu
Tel : (814) 862-8844
Fax : (603) 720-0701*

or

*Dr. Ralph Oliva
ISBM Executive Director
Professor of Marketing
The Pennsylvania State
University
402 Business Administration
Building
University Park, PA 16202-
3004
E-mail: rao8@psu.edu
Tel : (814) 863-2782
Fax : (603) 863-0414*

Attendee List

[to be added]