

# Automation Sales/Marketing Professional

**Alternate Titles:**

**Inside sales:** Customer Service Representative, Inside Sales Engineer, Technical Support Specialist

**Outside sales:** Field Sales, Automation Product Manager, Area Sales Representative, Regional Sales Representative, Industry Sales Representative, Account Representative, Sales Engineer, Product Marketing Manager

**Description:** Automation Sales/Marketing Professionals advise and assist clients and customers on the application, purchase, installation, and maintenance of available products and systems. They help companies find the right products to improve the efficiency, output, and safety of manufacturing and industrial processing operations.

**Sources of Material:** Certified Automation Professional Body of Knowledge, Automation Competency Model, Retail Industry Competency Model.

**Performance Domains:**

- I. Customer Focus
- II. Industry and Product Knowledge
- III. Training and Technical Support
- IV. Organizational - Business Systems
- V. Sales and Marketing

<b>Domain I: Customer Focus</b>	
<b>Task 1:</b> Initiate and maintain internal/external customer contacts.	
<b>Knowledge of:</b>	Territory or region Industries within the region Established work practices within the organization
<b>Skill in:</b>	Interpersonal communications Establishing and maintaining customer relationships Verbal and presentation skills
<b>Task 2:</b> Identify customer requirements.	
<b>Knowledge of:</b>	Business processes Automation products and performance Automation opportunity identification techniques Interviewing techniques
<b>Skill in:</b>	Asking questions to gather information Demonstrating an awareness of the customer’s requirements

	<p>Writing functional descriptions</p> <p>Communicating the functional descriptions to stakeholders</p>
<b>Task 3: Provide customer service.</b>	
<b>Knowledge of:</b>	<p>Customer requirements</p> <p>Basic process and/or equipment</p> <p>Automation techniques</p> <p>Marketplace products available</p>
<b>Skill in:</b>	<p>Gathering and providing accurate information</p> <p>Seeking and proposing solutions</p> <p>Establishing boundaries to control unreasonable expectations</p> <p>Gathering and reacting to customer feedback</p>
<b>Task 4: Keep customers informed.</b>	
<b>Knowledge of:</b>	<p>Project management techniques</p> <p>Communication techniques</p> <p>Product/service information resources</p>
<b>Skill in:</b>	<p>Organizing and carrying out a plan of action</p> <p>Presentation skills</p> <p>Taking effective action</p> <p>Changing gears in response to unpredictable events</p>
<b>Task 5: Document and communicate customer requirements to team members.</b>	
<b>Knowledge of:</b>	<p>Basis of design outlines</p> <p>User-requirement document outlines</p> <p>Team building techniques</p> <p>Consensus building techniques</p>
<b>Skill in:</b>	<p>Proposing automation solutions</p> <p>Writing in a technical and effective manner</p> <p>Compiling and summarizing information</p> <p>Making effective presentations</p>
<b>Domain II: Industry and Product Knowledge</b>	
<b>Task 1: Demonstrate knowledge of systems processes, applications, and standards supporting the design and application of automation.</b>	
<b>Knowledge of:</b>	<p>Automation types</p> <p>Automation project phases</p> <p>Codes, standards, and regulations</p>
<b>Skill in:</b>	<p>Describing the roll of automation and control in industrial processes</p> <p>Researching and applying emerging and future automation technologies</p> <p>Conceptualizing solutions</p>
<b>Task 2: Demonstrate knowledge of automation devices and their function.</b>	
<b>Knowledge of:</b>	<p>Instrumentation</p> <p>Sensors</p>

	<p>Controllers Robotics</p>
<b>Skill in:</b>	<p>Visualizing application Anticipating human factors Using logic and reasoning to propose solutions</p>
<b>Task 3:</b> Develop a preliminary automation strategy that matches the degree of automation required by the customer's requirements.	
<b>Knowledge of:</b>	<p>Automation strategies Automation components Various degrees of automation</p>
<b>Skill in:</b>	<p>Researching and proposing solutions Selecting appropriate components Making recommendations Articulating concepts</p>
<b>Task 4:</b> Perform continuous improvement by working with facility personnel in order to increase capacity, reliability, and/or efficiency.	
<b>Knowledge of:</b>	<p>Performance metrics Control theories System/equipment operations Business needs Optimization tools and methods</p>
<b>Skill in:</b>	<p>Analyzing data Communicating effectively with others Implementing continuous improvement procedures</p>
<b>Domain III: Training and Technical Support</b>	
<b>Task 1:</b> Provide technical support for facility personnel by applying system expertise in order to maximize system availability.	
<b>Knowledge of:</b>	<p>All system components Processes and equipment Automation system functionality Analytical trouble-shooting and root causes</p>
<b>Skill in:</b>	<p>Troubleshooting techniques Investigating and listening Analyzing data/input</p>
<b>Task 2:</b> Perform training needs analysis periodically for facility personnel using skill assessments in order to establish objectives for training programs.	
<b>Knowledge of:</b>	<p>Personnel training requirements Automation system technology Assessment frequency Assessment methodologies</p>
<b>Skill in:</b>	<p>Interviewing Information gathering</p>

	Assessing skill level
<b>Task 3:</b> Provide training for facility personnel by addressing identified objectives to ensure the skill level of personnel is adequate for the technology and products used in the system.	
<b>Knowledge of:</b>	Training resources Subject matter and training objectives Teaching methodology
<b>Skill in:</b>	Writing training objectives Creating training Organizing training classes Delivering training effectively Answering questions effectively
<b>Task 4:</b> Evaluate training interventions to determine effectiveness and document lessons learned to improve future training efforts.	
<b>Knowledge of:</b>	Performance metrics/expectations Assessment techniques Skill gap assessment
<b>Skill in:</b>	Communicating with others Analyzing results Documenting lessons learned Writing and summarizing
<b>Domain IV: Organizational – Business Systems</b>	
<b>Task 1:</b> Demonstrate knowledge of basic business principles, trends, and economics.	
<b>Knowledge of:</b>	Market characteristics Economic terminology Market supply/demand
<b>Skill in:</b>	Researching and gathering information Applying market knowledge to identify potential automation applications
<b>Task 2:</b> Act in the best interest of the company, co-workers, community, other stakeholders, and the environment.	
<b>Knowledge of:</b>	Business/professional ethics Environmental health and safety Best-value propositions
<b>Skill in:</b>	Keeping current Assimilating new information Problem solving
<b>Task 3:</b> Manage projects to bring about successful completion of the project and/or sales goals.	
<b>Knowledge of:</b>	Project management methodology Established work practices Resource allocation

<b>Skill in:</b>	Defining a project Goal setting Time management Organization
<b>Task 4:</b> Use internal and external customer resources effectively.	
<b>Knowledge of:</b>	Ordering systems Product and service resources Documentation requirements Customer Relationship Management Systems Manufacturing Information Systems
<b>Skill in:</b>	Researching resources Keeping current Applying time and cost efficient work practices
<b>Task 5:</b> Apply knowledge of business practices.	
<b>Knowledge of:</b>	Financial reporting Continuous improvement practices Performance standards
<b>Skill in:</b>	Managing accounts and budgets Analyzing input Using reporting tools
<b>Domain V: Sales and Marketing</b>	
<b>Task 1:</b> Contact new and existing customers to discuss their needs and how automation solutions can meet those needs.	
<b>Knowledge of:</b>	Principles and methods of sales Marketing strategies and tactics Sales control systems Customer needs assessment Customer satisfaction measures
<b>Skill in:</b>	Communicating effectively Negotiating Active listening Being perceptive of customer needs
<b>Task 2:</b> Maintain customer records using automated systems.	
<b>Knowledge of:</b>	Business systems ordering applications Transaction documentation requirements Supplier ordering systems
<b>Skill in:</b>	Using customer relationship management software/systems Using database user interface software Using spreadsheet software
<b>Task 3:</b> Negotiate prices and terms of sales and service agreements.	
<b>Knowledge of:</b>	Sales techniques Sales and service agreements

	Pricing strategies
<b>Skill in:</b>	Communication Persuasion Negotiating
<b>Task 4:</b> Prepare sales contracts.	
<b>Knowledge of:</b>	Contract policies and regulations Procurement practices Price quote parameters
<b>Skill in:</b>	Writing in a technical and effective manner Compiling and summarizing information Presenting information
<b>Task 5:</b> Track sales against goals and established standards.	
<b>Knowledge of:</b>	Organizational objectives Sales goals/expectations Customer service expectations
<b>Skill in:</b>	Using sales tracking software Data analysis Using new information and applying it to problem-solving techniques