



**PARTS, SERVICE AND
ATTACHMENTS GROWTH
HANDBOOK**

Foreword

Driving parts, service and attachments growth depends on teams with great ambition and the will to invest.

For those that succeed, the rewards are significant. It takes ambition to deliver ever more value to customers through parts, service and attachments. This same ambition drives customer satisfaction, customer retention, and ultimately sells the second machine to customers. Achieving at least 100% service absorption is also the key to long term business sustainability and competitiveness.

Ambition to grow is just an idea, until the team take action to invest. Winning new business depends on changing what we do.



This guide is intended to help JCB Dealers identify where to invest for growth. It has been developed through observation, identifying what our fastest growing dealers are already doing to drive growth in their businesses, and offering these as standards for us all to learn from. Many of the ideas are very simple, but implementing them in practice and ensuring that they become part of every-day life for the parts and service teams across a dealership is far from easy – it takes great leadership and commitment.

We could never hope for this to be an exhaustive guide, but it is a good checklist of the basics which can and should be applied in every dealership. We are confident that you will build on these ideas and add your own, and future revisions of the guide will include case studies on the new ideas and successes that your teams have delivered as they invest in their own ambitions for parts, service and attachments growth.

A handwritten signature in black ink, appearing to read 'Ian Sayers', written in a cursive style.

Ian Sayers

Managing Director, JCB Parts and Service

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Sell More Services



OVERVIEW

The best way to grow a parts and service business is to sell more services. The best dealers do this in three ways:

1. Sell service contracts at the new machine point of sale.
2. Use LiveLink to capture ad hoc service opportunities with customers that elect not to select a service contract.
3. Maintain a relationship with second and third life customers who have bought used equipment.

MEASURES

- Percentage of machines sold with a service contract, including extended warranty products (service contract penetration).
- Percentage of all machine services due that are carried out by the Dealer (LiveLink Dealer Service Penetration reported on the Parts And Service Performance Tracker).
- Service technician/engineer availability and response rate

BENCHMARKS AND GUIDELINES

- >50% service contract penetration in Construction Equipment markets and >85% in Agricultural markets.
- >30% extended warranty penetration. Extended warranty conditions mandate that the customer must service the machine with an authorised JCB Dealer.
- >80% LiveLink Dealer Service Penetration.
- KPI's measuring number of customers pro-actively contacted each week for scheduled service booking.
- >1 engineers/technicians per 50-150 machines in the machine park, depending on geography and market.

ESSENTIAL TOOLS AND PROCESSES

- A **pricing matrix** for machine sales teams to use to quote for service contracts at the point of machine sale.
 - This must be linked to sales incentives that reward sales people for selling service contracts.
 - This must be in place for all machines.
 - The best tools are simple, and give the sales person confidence by setting out the customer benefits of dealer servicing, standard terms and conditions, and clear pricing.
- A **LiveLink champion** whose role objective is to:
 - Use data from LiveLink to identify opportunities for machine service and repair.
 - Ensure that the customer is pro-actively contacted to book-in the machine for service and repair.
 - Maintain service history records in LiveLink. This is ideally automated using the LiveLink API to update from Dealer DMS.
 - Where dealer services cannot be secured, identify part sales opportunities for follow-up.
 - Livelink renewal rate %.

- **Engineer/technician capacity planning**, ensuring that sufficient engineers and technicians are available to perform warranty and revenue-generating services and repairs. The Dealer Excellence portal provides tools for calculating the required number of technicians/engineers for your machine park.

CASE STUDY

JCB Dealer A is routinely achieving more than 98% service contract penetration. Dealer A decided to build in an extended warranty contract as standard on all new machine sales, providing the customer with the option of selecting 3 year, 5 year or 10 year durations. Used machines are sold with the same standard option. Dealer A is achieving more than twice the global average parts sales per machine (UIO) as a result of customer retention.

JCB Dealer B appointed a dedicated LiveLink champion in 2012 to identify services due within the next week and to feed opportunities to the depot service teams. He is paid on a commission basis for the service bookings that the depots secure. Dealer B has exceeded their parts target every year since 2013.

Structured Machine Health Check (MHC) Process



OVERVIEW

A Machine Health Check (MHC) is a standardised process for conducting, reporting, and following-up on machine and attachment inspection to develop additional sales that give value to a customer. The best JCB dealers make the most of every opportunity to support customers when their engineers are with a JCB machine.

MEASURES

- Number of MHCs completed per month.
- Sales value of quotes generated from MHCs for additional sales.
- Win rate.

BENCHMARKS AND GUIDELINES

- MHCs completed for every machine visit and every machine service.
- >50% win rate.

ESSENTIAL TOOLS AND PROCESSES

- A **standardised MHC inspection checklist** in active use by service engineers as standard during workshop and field-based service and repair which inspects both the machine and attachment condition (see appendix A for an example).

- A **process for quotation and follow-up**, to ensure that the additional sales opportunities identified during inspection are acted on and converted to sales.

CASE STUDY

JCB Dealer C has been carrying out MHC inspections routinely for more than 9 years. 58% of the inspections have been converted to sales this year, averaging between £192 and £369 additional sales per machine service and repair. For field-based services, Dealer C tailors a standard kit of additional parts for each machine that are likely to be required, and issues it to the engineer in advance of the customer visit so that additional work can be quoted and carried out first-time. This is also applied for repair visits.

JCB Dealer D has recently implemented mandatory MHC inspections for all workshop and field-based services and repairs. Inspection checklists are completed by the dealer's engineers using tablet-style PDAs, and signed-off by the customer, automatically alerting dedicated service administrators in each depot to quote and follow-up on the opportunity. Dealer D is already achieving more than 60% win rate, contributing between 3% and 7% retail sales growth per depot.

Machine Serial Number: _____

■ OK
 ■ Flag
 ■ Action required

Category	Item	OK	Flag	Action required
General	All lights incl beacon	█	█	█
	All Pivot Pins	█	█	█
	Grease points	█	█	█
	Boom/ Dipper Condition	█	█	█
	Wear Pad condition	█	█	█
	Debris Contamination	█	█	█
	Work Condition	█	█	█
	Bracket locking bar	█	█	█
	Controls and Switches	█	█	█
	Light Codes	█	█	█
Engine operation & condition	█	█	█	
Service due	█	█	█	
Safety	All Safety Decals	█	█	█
	Load chart	█	█	█
	Seat belt / Seat condition	█	█	█
	Cab protection	█	█	█
Fire extinguisher	█	█	█	
Isolator	█	█	█	
Hydraulics	Condition	█	█	█
	Leaks	█	█	█
	and pipes	█	█	█
	and lubrication	█	█	█
Engine	Visible leaks	█	█	█
	Cooler condition	█	█	█
	Drive belts and pulleys	█	█	█
	Exhaust	█	█	█
Coolant strength	█	█	█	
Transmission / Axles	Condition	█	█	█
	Oil level	█	█	█
	Wear nuts	█	█	█
Bodywork	Cab	█	█	█
	Engine covers / pod	█	█	█
	Underbody protection	█	█	█
	Undercarriage	█	█	█
	Mudguards	█	█	█
	Door handles	█	█	█
	Glazing and mirrors	█	█	█
Step condition	█	█	█	
Bodywork	█	█	█	

Sales Training for Parts, Service and Attachment Teams



OVERVIEW

Every member of the parts, service and attachment team is a sales person who has regular contact with your customers. Their contact hours with your customers will exceed that of your sales team many times over, so it is essential that they are professionally trained, not just as technical experts, but also as sales professionals. The best JCB dealers are routinely investing in product and sales training for all of their parts and service team members, and regularly assessing their capability.

Well trained people will make the most of every customer enquiry, responding quickly, following-up, and selling effectively.

MEASURES

- Percentage of parts and service employees trained in product and sales.
- Performance management objectives in place for all team members.
- All quotes followed-up within 24-hours.
- Win rate.

BENCHMARKS AND GUIDELINES

- Product and sales training (or refresher training) completed for 100% of team members within the last 3 years.
- SMART performance objectives in place for all team members.
- >30% win rate.
- 100/100 mystery shopper score

ESSENTIAL TOOLS AND PROCESSES

- **Training matrix** including sales and product training covering all parts and service team members in office, workshop and field-based roles.
- A simple **enquiry pad** to help parts and service people respond quickly and effectively to customer enquiries. This must ensure the enquiry is properly captured, quoted, up-sold, and followed-up. (see appendix B for an example).
- **Menu pricing** for parts fitting, providing parts teams with the information they need to quote a fitted price.
- An independent method for regularly assessing the sales capability of the parts and service team. For example, **mystery shopper** scores.

CASE STUDY

JCB Dealer E took part in a mystery shopper exercise last year which identified specific areas for sales improvement. Dealer E responded by investing in professional sales training for all parts team members. A second mystery shopper exercise completed after the training showed an improvement of 24% in average score and more than 37% in selling-related measures. Having missed the parts sales target last year, Dealer E is now on track to exceed this year's parts sales target by 8%. Dealer E is now planning to extend the training to service team members.

*“Sales sell the first machine.
Service sells the second.”*
J.C. Bamford.

Focus on Growth Opportunities



OVERVIEW

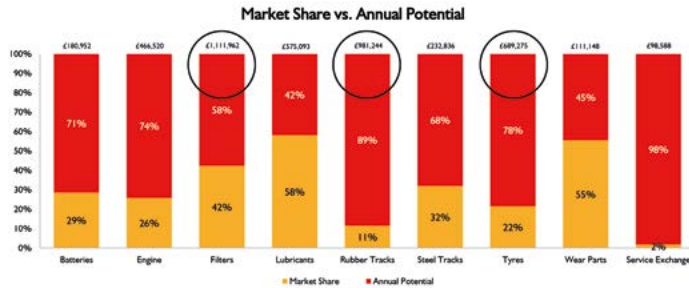
Growing sales requires teams to capture market share by winning sales that are not being won today. Historical sales to existing customers are not the best indicator of where to focus for growth. The best JCB dealers are making use of the JCB Parts Opportunity Calculator to identify products that JCB customers need, and which are not being sourced from JCB dealers today. These dealers are exploring new ways of doing business, and adapting to meet the customer's needs.

MEASURES

- Parts market share vs annual potential, as shown on the parts opportunity calculator.
- Quantified and timed plans in place by product to grow market share

BENCHMARKS AND GUIDELINES

- Specific plans for between 3 and 5 parts products, focussed on significant revenue opportunities, with clear actions to address the customer need.



ESSENTIAL TOOLS AND PROCESSES

- **Customer spend gap analysis by product**, identifying areas for sales growth.
- **Competitive information gathering and analysis**, where possible including product performance, service levels, warranty, brand, and price.
- **Capture plan**, identifying key customers by product group (core 8) with specific actions to grow the business in each area. (See appendix C).
- **Building Blocks**, identifying the key areas for growth during the year to achieve targets and beyond. (See appendix C).

CASE STUDY

JCB Dealer F used the JCB Parts Opportunity Calculator to identify tyres as a focus for market share growth. Last year Dealer F won a 20% market share in tyres, making tyres 3% of their annual parts business. Customer feedback indicated that lost sales were driven by customer need for a tyre fitting service, which the dealer didn't offer at that time. Dealer F worked together with JCB to establish a fitting service for customers, investing in stocks of key tyre sizes at depots across the region, and marketing the new capability. Tyre retails more than doubled in the months following the initiative, at a run-rate 125% above normal levels. Reviewing the performance, Dealer F noted that few additional customers were selecting the fitted option, preferring instead to purchase the tyre alone as a result of the improvement in availability and marketing.

JCB Dealer G used the JCB Parts Opportunity Calculator to identify lubricants and tyres as key growth opportunities with their customers. Dealer G worked with JCB to develop a localised lubricant supply chain and a direct-ship tyre programme, improving customer support and pricing to meet the customer need. Retails more than doubled following the initiative, contributing to the highest growth in parts sales per machine of any JCB dealership this year. Dealer G is now achieving parts sales per machine that are nearly twice the global average, and continuing to grow by looking for more new ways to support customers.

Drive Customer Accounts



*“Our customers can get along without us.
We can’t get along without them.”*

J.C. Bamford.

OVERVIEW

Every customer is different. Winning new business with customers requires a deep understanding of the customer’s unique needs, which often go far beyond simple price comparisons, and a willingness to adapt our offering to meet the customer’s need. The best JCB dealers are always listening and finding better ways to satisfy the customer. These dealers have well developed capture plans to adapt their offerings to win additional business with key customers, and are measuring their implementation.

MEASURES

- Regular Parts and Service Sales Representative (PSSR) customer visits to all key customers. (see appendix D for a PSSR job description).
- Quantified and timed plans in place by customer to grow market share.

BENCHMARKS AND GUIDELINES

- > 1 PSSR per 1,000 machines.
- Specific plans for key customers, focussed on significant revenue opportunities, with clear actions to address the customer need.

ESSENTIAL TOOLS AND PROCESSES

- **Customer spend gap analysis by product**, identifying areas for sales growth.
- **Competitive information gathering and analysis**, where possible including product performance, service levels, warranty, brand, and price.
- **CRM system and plan**, to record customer information and pro-actively follow up according to individual customer needs.

CASE STUDY

PSSRs at JCB Dealer H visit an average of 5 customers per day each, generating £1,400 retail sales per day. Dealer H employs 5 PSSRs across the business, supporting customers with 4,300 machines, generating more than £1.3m annual sales.

JCB Dealer J identified an opportunity to win additional parts sales to a customer with a large multi-brand machine park. Sales meetings revealed that the customer was willing to re-source parts supply to Dealer J, but only if a number of pre-conditions could be satisfied. Dealer J worked with JCB to develop such an offer, starting first with rubber tracks, securing £400,000 of additional sales. Dealer J is now working on a second campaign to win sales of further product types, including a fleet-wide deployment of LiveLink lite.

*“If it’s important to our customers,
then it’s important to us.”*

Lord Bamford.

Run Active Campaigns

OVERVIEW

Running a planned schedule of parts and service promotions and campaigns encourages sales teams to be pro-active and customer focussed, leading to increased retail volumes. The objective of successful campaigns is to reach new customers, or reach existing customers with JCB parts and services that they currently source elsewhere. This requires a pro-active approach to win incremental retail volumes. The best JCB dealers run an annual marketing plan incorporating active campaigns to promote and to win new customers.

MEASURES

- Performance vs target during JCB led campaign activity
 - shown on P&S Tracker.
- Retention after completion of the campaign activity.

BENCHMARKS AND GUIDELINES

- Every member of the team is aware of the current campaign and actively promoting at every customer touch-point.
- Campaigns actively communicated to relevant customers directly (for example using a CRM system or telephone campaign) and via appropriate social media channels, company website and depot foyer displays.

ESSENTIAL TOOLS AND PROCESSES

- **Fully maintained CRM** with up-to-date customer contacts, machine parks, buying history and sales plan.
- **Marketing plan** with annual calendar of campaigns and promotions.

CASE STUDY

JCB Dealer K runs an annual calendar of campaigns focussed on key growth products. Each campaign is delivered in the same structured way. Customers are contacted using CRM during the campaign, with information about the promotions available. Customers are then contacted by telephone within the first 48 hours of the campaign, with personalised details on their average annual consumption and the value of savings that the campaign could represent. Follow-up calls are made to all customers in the last 48 hours of the campaign. JCB Dealer K has seen a 25% - 35% increase in annual parts sales as a result of these campaigns, and by focussing on incremental customers has achieved this with no significant impact on retail run-rate before or after the campaign.

Revealed this month

20% OFF

SELECTED GENUINE JCB PARTS
 Glass - Mirrors - Fenders
 Body Panels - Decals
 Lights - Lenses - Beacons
 Seats - Seat Components



GREASE JCB Grease is the best
 Save 10% buy 2 Boxes
 Save 15% buy 3 Boxes
 Save 25% buy 4 Boxes

LUBRICANTS
 Spend over £100 get 15% off
 Spend over £250 get 20% off
 Spend over £500 get 25% off

1. JCB Equipment - replacement parts. Along with the best value for your JCB. 2. JCB Parts - Models & Sales Centres. 3. JCB Grease - JCB Grease is the best. 4. JCB Lubricants - JCB Lubricants are the best. 5. JCB Parts - JCB Parts are the best.




SHARP PRICING ON GENUINE JCB WEARPARTS

plus FREE fittings



20% OFF buckets and selected replacement parts

Whilst saving bucket-loads

The 20% off applies to all JCB buckets and selected replacement parts. 20% off is not available on all JCB buckets and selected replacement parts. 20% off is not available on all JCB buckets and selected replacement parts. 20% off is not available on all JCB buckets and selected replacement parts.



SIGN UP TODAY

FOR A SERVICE CONTRACT



and you could **WIN** a race experience for two in **Abu Dhabi**
 PLUS A free '90 stop' visual machine health check on every service.

JCB WILLIAMS MARTINI RACING
OFFICIAL PARTNER

Contact your JCB dealer for more details




10% OFF

All Antifreeze & Batteries



Summer season's going fast, be the first to beat winter.

Batteries NOW available for all Access Platform models too.

JCB WILLIAMS MARTINI RACING
OFFICIAL PARTNER




Drive Attachments Growth



OVERVIEW

It is the sale of the attachment that allows the machine to be tailored for a specific “application”, enabling the dealership to sell JCB solutions (machines, attachments, parts and service) into new sectors and customers. Yet many dealers are missing the profit opportunity that selling the complete package can bring to their business.

There are 3 main channels for your business to focus attachment sales growth:

1. Regular marketing communications made to existing JCB customers, with information on new products and sales campaigns,
2. Regular customer visits from your PSSR's to create awareness and open up new sales opportunities (to key customers and competitor customers).
3. Most significantly selling the attachment at the point of selling the machine, to help deliver the ultimate customer solution.

Benefits of selling genuine JCB attachments include:

- Fully approved and signed off for safe use and optimal performance on JCB machines.
- Over 90% off-the-shelf availability of top 600 attachments held across JCB's global warehouses, making it easier for our dealers and customers to do business with us.
- Ability to wrap up the sale of the attachment in with machine finance package.

MEASURES

- £'s per retail growth (by dividing the retail value of attachments sold with new machines, by the number of machines retailed) at dealer, and machine sales person level.
- Attachments per UIO for sales made into the aftermarket by your PSSR's and parts counter sales teams.
- No. of enquiries produced, leads converted and revenue generated from each marketing promotion.

BENCHMARKS AND GUIDELINES

- **Regular marketing communications** to existing customers promoting new products and campaigns, and improving awareness of the range.
- **KPI's for machine sales teams and PSSR's**, with targets and incentives for increasing attachment sales penetration.
- **Attachments demonstration programme** – carrying out product demonstrations and evaluations with key target customers.
- **Include attachments in every machine quote**, whether the customer has requested it or not.

ESSENTIAL TOOLS AND PROCESSES

- **Attachments sales dealer growth plans**, showing £'s per retail performance and growth opportunities across core products.
- **Team training** using the JCB Attachments online training modules to help the sales team to promote genuine JCB attachments.
- **Salesmen incentives**, help to motivate sales teams to sell attachments and improve the average revenue sale value across your business.

CASE STUDY

JCB Dealer J targets all machine sales team members to upsell attachments at the point of every machine sale. This has resulted in them achieving a 74% £'s per retail increase on the JCB global average, resulting in more than £900k of additional sales revenue for every 1,000 machines retailed.

JCB Dealer K rewards their machine sales team members with a higher commission for selling the attachment than the machine, as they recognise the machine sale is a prerequisite for selling the attachment – selling the solution. This dealer's £'s per retail value stands at a massive 155% above the global average, meaning that they generate an additional £1.9m in attachments sales revenue than the average dealer for every 1,000 machines retailed.

Actively Recover Lost Customers

OVERVIEW

The best way to grow a business is to retain customers. However, lost customers provide a unique opportunity to win incremental business. Every lost customer has at some point chosen to buy a JCB, whether it be new or second hand, and by listening to their needs, may choose to buy from JCB again. These improvements also help drive retention in other customers. The best JCB dealers are actively finding ways to pursue second life customers as well as first life customers and are seeking feedback on lost sales in a structured way, adapting business offerings, and pro-actively targeting recovery of lost customers.

MEASURES

- Every lost customer (With a new or second hand machine that has not bought parts and services from JCB within the previous 9 months) is actively contacted with a targeted offer.
- Win rate.

BENCHMARKS AND GUIDELINES

- >20% recovery rate of lost customers.

ESSENTIAL TOOLS AND PROCESSES

- **Targeted sales tools** designed to recover lost customers, for example:
 - LiveLink data on customer's machine health and next scheduled service.
 - Parts and service campaign or promotion targeted at customer's machine park.
 - Free-of-charge Machine Health Check (MHC) inspection.

CASE STUDY

JCB Dealer N runs a structured programme to contact every lost customer within 3 months of their last parts purchase. Every lost customer is visited in person by a PSSR, and loss-reports are created in CRM to record, analyse and respond to the factors influencing the customer to buy from alternative sources. Customers are offered a free MHC, followed up with a written report, and quotation for any necessary repair without obligation. JCB Dealer N records the number of lost customer visits and the percentage of lost customers recovered per week.

Incentivise the Sales Team

OVERVIEW

Well selected, well trained and well managed teams are essential to deliver good customer service and growth. Incentives are only a piece of this picture, but to deliver sales growth they are a very important piece. For a parts and service team, every person who comes into contact with the customer is a potential sales person: from the parts counter team and the PSSRs to the delivery drivers; from the engineers and technicians to the service manager. It is essential that these teams are incentivised as sales people, including upsell to provide additional value to customers. The best JCB dealers have individual incentive programmes in place not only for every member of the parts and service team, but also motivating machine sales teams to cross-sell service contracts and attachments.

MEASURES

- Revenue-based incentive programmes in place for all parts and service people.
- Incentive programmes in place for all machine sales people specifically rewarding service contract and attachment sales.

BENCHMARKS AND GUIDELINES

- Appropriate commission rates vary significantly from country, but typically parts and service should be in line with machine sales commission rates.

ESSENTIAL TOOLS AND PROCESSES

- **Individual sales incentives plans** for parts, service and machine sales employees.

CASE STUDY

JCB Dealer P introduced incentives for their machine sales team, specifically designed to drive sales of service contracts. The sales team were issued with simple pricing tables for service contracts by machine, application and duration, and a standardised set of terms and conditions. Crucially, this was also linked to individual sales incentives, with longer service contracts delivering larger personal incentives. Sales of service contracts increase by more than five times.



Lead from the Top

OVERVIEW

The best JCB dealers today demonstrate complete commitment from the CEO/MD/Principal, the Sales Director, and the Parts/Service Director to achieving > 100% service absorption. Alignment of these top three leaders to focus parts and service sales growth is fundamental to success.

MEASURES

- Service absorption.
- Parts purchases per machine in operation (UIO).

BENCHMARKS AND GUIDELINES

- Service absorption > 100%
- Consistent positive year-on-year UIO growth, on track to exceed individual growth targets.

ESSENTIAL TOOLS AND PROCESSES

- Drive effective parts and service business management to ensure parts, service and sales work together as one team.

Off-the-Shelf Availability

OVERVIEW

Customer buying decisions often depend strongly on parts availability. Stocking the right parts to meet demand is essential to compete. The best JCB dealers are using stock management tools to forecast demand and manage inventory to deliver exceptional availability.

MEASURES

- Off-the-shelf availability.

BENCHMARKS AND GUIDELINES

- >80% availability (world class is >90%).
- >80% stock order efficiency.


ESSENTIAL TOOLS AND PROCESSES

- Active use of the **Synchron stock management system**.

Appendices

Appendix A – Example MHC Inspection Checklist

Machine Inspection Checklist



Customer Name: _____

Machine Serial Number: _____


Key

■ OK
 ■ Flag
 ■ Action required

<p>General (Please tick box)</p> <p>All lights incl beacon ■ ■ ■</p> <p>All Pivot Pins ■ ■ ■</p> <p>Grease points ■ ■ ■</p> <p>Booms/ Dipper Condition ■ ■ ■</p> <p>Wear Pad condition ■ ■ ■</p> <p>Debris Contamination ■ ■ ■</p> <p>Fork Condition ■ ■ ■</p> <p>Bucket locking bar ■ ■ ■</p> <p>Controls and Switches ■ ■ ■</p> <p>Fault Codes ■ ■ ■</p> <p>Wiper operation & condition ■ ■ ■</p> <p>Service due ■ ■ ■</p>	<p>Safety (Please tick box)</p> <p>All Safety Decals ■ ■ ■</p> <p>Load chart ■ ■ ■</p> <p>Seat belt / Seat condition ■ ■ ■</p> <p>Cab protection ■ ■ ■</p> <p>Fire extinguisher ■ ■ ■</p> <p>Isolator ■ ■ ■</p>
<p>Hydraulics (Please tick box)</p> <p>Ram condition ■ ■ ■</p> <p>Visible leaks ■ ■ ■</p> <p>Hoses and pipes ■ ■ ■</p> <p>Phasing and lubrication ■ ■ ■</p>	<p>Engine (Please tick box)</p> <p>Visible leaks ■ ■ ■</p> <p>Cooler condition ■ ■ ■</p> <p>Drive belts and pulleys ■ ■ ■</p> <p>Exhaust ■ ■ ■</p> <p>Coolant strength ■ ■ ■</p>
<p>Wheels / Transmission / Axles (Please tick box)</p> <p>Visible leaks ■ ■ ■</p> <p>Tyre condition / wear ■ ■ ■</p> <p>Axle / wheel nuts ■ ■ ■</p>	<p>Bodywork (Please tick box)</p> <p>Cab ■ ■ ■</p> <p>Engine covers / pod ■ ■ ■</p> <p>Underbody protection ■ ■ ■</p> <p>Undercarriage ■ ■ ■</p> <p>Mudguards ■ ■ ■</p> <p>Door handles ■ ■ ■</p> <p>Glazing and mirrors ■ ■ ■</p> <p>Step condition ■ ■ ■</p> <p>Bodywork ■ ■ ■</p>

Comments: _____

Appendix B – Example Enquiry Response Form

GUNN JCB

Aftersales Enquiry

1. Obtain Customer Information – “Good Morning/Afternoon, Gunn JCB... [Name] speaking”

“Who’s calling please?”

“Can I take your name?”

“Can I take your number, just in case we get cut off?”

2. Enquiry Details – “What can I help you with today?”

Machine Model:	Serial Number:	Quotation Number:

3. Up-sell other parts required – “You may need these other parts to complete that repair...”

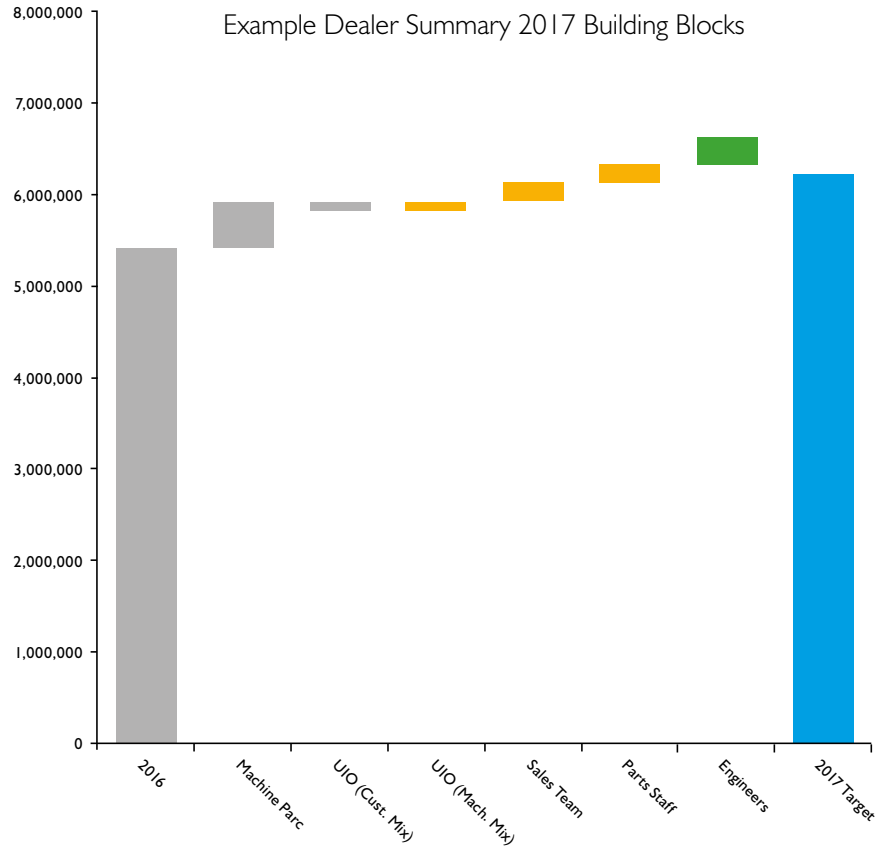
4. Offer Service Assistance to fit parts – “Do you need any assistance in fitting the parts?”

5. Introduce Parts Campaign – “Whilst you’re on, can I just let you know about our offer on...”

Not given the order? Put in the FOLLOW-UP FILE

Name: Date:

Appendix C – Example Building Block



Appendix C – Example Capture Plan

CUSTOMER CAPTURE PLAN – RUBBER TRACKS				
Date	24/10/2017			
Target Customers	Mr J Bloggs	Mr Jones	M R Engineers	Mr Williams
Machine Parc				
Fleet List	MINI/MIDI x845	BHL x 17		BHL x 9
	DUMPER x105	LDL x 4	LDL X 169	LDL x 1
	TEREX DUMPER x17	JS x 9	MINI/MIDI x 19	JS130 x 11
	THWAITES DUMPER x136	MINI/MIDI x 55	RTFL x 6	MINI/MIDI x 9
	GEETH DUMPSTER x11	DUMPERS x 13	SD580 Pedestrian Roller X 2	DUMPERS (various) x 3
	JCB DUMPSTER x13	VMT 16-100 ROLLER	HM25 Breaker X 6	SSL x 1
	TCP TRACKED LOADER x9	MF TRACTOR	POWERPACK X 6	Komatsu x 1
	POWER BARROW x14	BOMAG ROLLER x 2		
Current Spend on Product Group R12	28783	1018	300	3169
Total Parts Spend R12	511237	16058	93,010	23056
Current Supplier	Astrac	CES & Astrac	Astrac	Astrac & CES
Visit Arranged For	20/06/2017	Oct- Nov -17	Oct- Nov -17	Oct-Nov 17
Capture Plan	Container Purchased 2-3 Day Lead Time Awareness Promotion	Container Purchased 2-3 Day Lead Time Awareness Promotion	Obtained Competitive pricing Awareness Promotion	Obtained Competitive pricing
Staff Training	100% parts staff completed online training			
AOB.				

Appendix D – Example PSSR Job Description

KEY FOCUS OF THE ROLE

- Managing, motivating and developing the aftermarket relationship with JCB customers in the region
- Working through JCB dealers, to ensure the development and implementation of structured sales and marketing plans to deliver annual sales and profit objectives
- Identifying development requirements within the dealers covering all aspects of the aftermarket operation, including training, stock management, after-sales marketing, aftermarket product range and use of JCB systems
- Ensuring that JCB's customer's interests are represented and communicated within the organisation

SPECIFIC ROLES AND RESPONSIBILITIES

- Working with subsidiaries / dealers in your respective areas, to achieve the annual sales & profit forecast for parts
- Developing and implementing marketing & sales plan for the territory. This should include structured sales campaigns to deliver the annual sales plan objectives, whether they are part of the national programme or on a local basis
- Working with the customers / dealers, to analyse the dealer's business management structure and develop their operation commercially
- Looking at "new product" opportunities and feedback information to the Product Department that will lead to future potential opportunity

- Spending time out visiting dealers / customers, to understand their KCV's, to assess their satisfaction and how we performance on all aspects of JCB Service's business
- Reviewing lost sales information and decide upon a course of action to resolve the issue
- Being aware of competitive parts supplier activities
- Working with the service departments to develop the concept of service linked parts offers
- Carrying out regular reviews with senior management, and half yearly meeting with dealer MDs where appropriate.
- With all available Servicing reporting from JCB Service Livelink team, ensuring that any opportunities which may exist are identified; and also ensuring that a plan for execution is identified with actual Service Penetration by Dealer / Region, and with all missed Service Opportunities
- Reviewing with each Livelink champion, and ensuring JCB has regular Livelink reporting in all Management reporting

In addition to this there are numerous tasks that you will become involved in, that occur on a day to day basis that impact on the overall business.

MAIN TASKS RELATING TO ABOVE:

1. Sales development:

- Compile the parts sales forecast for the assigned territory
- Analyse the performance against target to identify growth opportunity or spot trends that do not match the sales plan objective
- Develop an effective sales incentive to encourage dealers to exceed their targets and to implement marketing initiatives

2. Business development:

Implement and develop marketing initiatives appropriate to each territory / product:

- Effective retail promotions – Implement parts marketing programs
- Customer Focus Programs - Implement customer focus programs
- Marketing of Service work – Implement service marketing programs

3. Market feedback:

Establish key customer values and competitive position through:

- Competitive Activity Surveys – Conduct as necessary
- Customer Satisfaction Surveys – Conduct customer questionnaires as necessary

4. Product requirements:

- Identify and feedback of any new product requirements to the product department and JCB.

5. Pricing requirements:

- Identify and feedback the pricing levels required to maintain a competitive position.
- Ensure that any pricing review for a promotion is in line with the profit objective and market requirements.

CANDIDATE SPECIFICATION

The role requires an individual with strong commercial acumen and the ability to conduct structured business analysis, along with the ability to communicate effectively with customers, dealer personnel, and at all levels within the organisation.

Experience of dealer management in a similar environment is essential, as is an understanding of customer requirements and how these translate into key actions both for JCB and the dealer.

Most of all JCB are looking for someone who can make a real difference in what is a fast moving and challenging environment.







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JCB SERVICE, Waterloo Park, Beamhurst, Uttoxeter ST14 5PA

Tel: +44(0) 1889 590312 www.jcb.com