

# **Dealer Development: OEM Regional Manager's Guide**

By Walter J. McDonald

## **TABLE OF CONTENTS**

**Dedication**

**This Book is Written For**

**Foreword by Luke Sheppard**

**Preface**

**A CPA's Financial Perspective**

**Introduction**

**List of Figures and Tables**

**Acknowledgements**

### **PART ONE**

## **Dealer Development History**

**Three OEM Dealer Development Case Histories**

**J.I. Case – 1970's-1980's**

*Pioneers the Dealer Development Process*

**Bobcat – 1980's-1990's**

*Moves Up to Next Level:*

**Mitsubishi Caterpillar Forklift America–1990's**

*Improves the Dealer Development Process*

### **PART TWO**

## **Building an Optimum Manufacturer-Dealer Partnership**

**Dealer Recruitment**

**The OEM Perspective —Optimizing Field Team**

**Performance**

**Multiple Challenges of RSM Leadership**

**RSM Self-Assessment**

**Dealer Development Checklist**

**Role of Successful "Indirect" Supervisor**

**The Dealer Perspective— Insights into**

**Relationship Building**

**Traditional OEM Position**

**Dealer Principal Perspective**

**Relationship Building in Dealer**

**Development Process**

Who Do Small Business Owners Trust?  
Your Many Roles in Dealer Development  
Expectations—Dealers Respond  
What is Needed and Expected  
The “Never Do's”  
How Dealers Evaluate Their  
Manufacturers

### **PART THREE**

## **The Eight Dealer Development Tools**

**Tool 1** The Strategic Profile: The Heart of  
Consultative Selling

**Tool 2** The Market Development Profile

**Tool 3** Dealer Sales Performance Metrics—  
Triage

**Tool 4** Product Support Performance Profile—  
Triage

**Tool 5** Dealer Focus and Specialization

**Tool 6** The Dealer Development Portfolio--

**Tool 7** Dealer Revenue Center Performance:  
In Depth Assessments

**Tool 7 Step One – Benchmarking**

Managing the Dealership Overall

*Data Analytics for Sales and*

*Marketing Strategy*

*Returns on Digital Investments*

*How to Avoid Death by 10,000 Cuts*

*or, How to Improve Dealer Cash Flow*

Managing the Parts Operations

Managing the Service Operations

Managing Rental Operations

Managing Used Machinery Sales

Managing New Machinery Sales

Managing Customer Service & Retention

**Tool 7 Step Two: World Class Best Practices**

Information Technology

Dealer Strategy Development

Dealer Parts Operations

Dealer Service Operations

**Dealer Rental Operations**  
**Dealer Used Equipment**

**Dealer New Equipment Sales and  
Marketing Management**  
*A/B Account Growth Focus: Market  
Share Development*

**Dealer Customer Service and Retention**  
*Customer Retention by the Numbers*  
*600 Best Practices and Where  
to Find Them*

**Tool 7 Step Three: Projecting A Dealer's  
Realistic Financial Potential**

**Tool 8 *The Master's Program in  
Machinery Dealer Management Development--***

**The Complete Master's Program in  
Dealer Management Eight Book Set  
with Comprehensive Study Guide**

## **PART FOUR**

### **OEM Dealer Development: “How To” Recommendations**

- 1. How Do We As An OEM Best Approach  
Product Support For Our Dealers?**
- 2. How Do We As An OEM Best Focus our  
OEM Dealer Development Efforts? And,  
How Do We Build Dealer Enthusiasm for  
Our Products?**

## **PART FIVE**

### **New Dealer Assignment Challenge— Four Problem Case Studies**

- Case 1—Leave Us Alone*
- Case 2—Only Have Time to Sell*
- Case 3—We Can't Fix What's Not Broken*
- Case 4—Waste of Time*

## **Possible Case Study Solutions**

Case 1—*Leave Us Alone*

Case 2—*Only Have Time to Sell*

Case 3—*We Can't Fix What's Not Broken*

Case 4—*Waste of Time*

## **APPENDIX**

*How Dealers Can Avoid Problems with OEM*

*Sales and Service Agreements: Are They*

*Functional or Fractured?*

Guest Contributors

## **INDEX**

## **ABOUT THE AUTHOR**