



NATIONAL ELECTRICAL MANUFACTURERS
REPRESENTATIVES ASSOCIATION

***NEMRA GUIDELINES
For Technology and
Communications***

***Developed in conjunction with The
NEMRA Manufacturers Group***

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Overview

In December 2001, the Board of Directors of the National Electrical Manufacturers Representatives Association and the NEMRA Manufacturers Group Executive Committee formed a task force to study the issues and technological/communications needs of both manufacturers and representatives operating in today's dynamic electrical industry. The task force, along with research collected for NEMRA by the PresentFutures Group, produced this publication: the NEMRA Guidelines for Technology and Communications.

These guidelines highlight standards and best practices for technology and communications between electrical manufacturers and representatives. Their purpose is to enable manufacturer and representative companies to simplify business practices, enhance productivity, and achieve better electronic communication.

Task Force Objectives

- Identify conflicts and develop solutions for technology and communications issues as they specifically relate to representatives and manufacturers operating in the electrical industry.
- Create guidelines and minimum standards for technological and electronic communications capabilities for use by NEMRA representative firms and manufacturing companies.
- Create a forum for ideas and best practices specific to technology and electronic communications use in, and between, representative firms and manufacturing companies operating in the electrical industry.

Current Issues and Best Practices

Because of the constant change within technology and the electrical industry, the issues and best practices that follow will also change over time. Consequently, NEMRA will update these guidelines on a periodic basis.

Based on the survey results and discussions with Information Technology professionals at both manufacturing companies and representative firms, a number of critical issues were identified. From this, the subcommittee developed the following "best practices" for technology and electronic communication.

Overall Goal of Best Practices

The goal of this guideline is to help representatives and manufacturers overcome the obstacles that inhibit effective and consistent electronic communication between their organizations.

Solutions: Best Practices to Achieving the Goal

- Use e-mail systems/browsers that have adequate download capabilities. For example, the capacity to read and download PDF files and/or large word processing or spreadsheet files.
- Use computers that have adequate memory and speed, and that are compatible with those being used by the manufacturer and the representative firm respectively, i.e. Windows-based operating systems and Microsoft Office.
- Manufacturers and representatives firms should have adequate and updated virus protection and/or security systems.

- Representative and manufacturer companies should use e-mail addresses that clearly identify their company and themselves individually, i.e. "www.company.com", or "lastname@company.com".
- Immediately notify your key e-mail contacts after switching e-mail providers and addresses.
- Manufacturers and representatives should follow simple rules, procedures and/or common e-mail etiquette.
- E-mail response time should be 24 to 48 hours. E-mail should not be used as "emergency communication." Telephone/voice mail should be used for emergencies or in situations where an immediate response is required, i.e. notice of next day conference calls, etc.
- Always target e-mails and/or attachments to the recipient responsible for their distribution or response action. For example, certain e-mails and/or attachments should be forwarded to the representative firm's "sales manager" for screening and distribution instead of being sent en masse to all rep firm personnel.
- Instead of sending large attachments, whenever possible, send an e-mail directing the recipient to a web site where the file can be downloaded (i.e. brochures or catalogs).
- Representatives and manufacturers should not expect their e-mail recipients to also be their printing company. If brochures and catalogs need to be printed en mass (black and white, or color), then the documents should be printed and mailed to the recipient.
- Sales and commission reports should be available for download from the manufacturer's web site, or at least sent in usable electronic format, on a timely and regular basis.
- Ultimately, order entry, order status, inventory information, specifications, presentations, brochures and project tracking should be made available through a manufacturer's web site.
- Investments in technology, computerization and computer related training foster professionalism, leading edge companies, and productivity.

Technology and Communications Capabilities for Representative Firms

The following list of technological and communication capabilities are recommended so that representatives can effectively communicate with their manufacturers and operate an efficient and productive rep firm.

- ❖ **Office Equipment:** The physical equipment required to effectively manage the representatives' business operations in a productive and cost effective manner. Examples include a phone system with multiple lines and /or conference calls capabilities, voice mail/answering device, cellular phones for outside sales personnel, copy machine and fax machine.
- ❖ **Computer Systems:** This includes the hardware and software needed to enhance office operations, increase productivity and effectively communicate with manufacturers. Examples include, hardware: a desktop or laptop using at least Windows '95 with CD ROM, modems with 56k capability for on-line access, printer, Internet Service Provider (ISP) and e-mail, e-mail software with attachment capability, word processing software, spreadsheet software, quoting software and virus detection/ removal software

- ❖ **Advanced Systems:** Many representative firms have found that more advanced office and computer systems provide productivity gains and enhanced electronic communications capabilities. Advanced systems might include:
 - DSL line
 - PDA (personal digital assistant/hand held devices)
 - digital camera
 - network or hub operating system for file sharing
 - accounting software
 - outsourced payroll services
 - contact management software
 - sales analysis software
 - presentation software
 - web site
 - firewall software
 - data storage system
 - ability to print plans
 - FW Dodge reports/CMD or other construction data statistics
 - CAD Software
 - optical character recognition (OCR) software.

E-Mail Guidelines

Even with the best of intentions, misinterpretations are likely to occur in almost every type of communication. It is possible to repair most misunderstandings in a face-to-face dialog or a telephone conversation before any real communication problems occur. However, electronic mail does not offer the benefit of verbal inflection or physical gestures for e-mail users. Therefore, the guidelines that follow are intended to help reduce the misunderstandings and other communication challenges brought on by e-mail use.

- **Address/Naming Convention:** Always make the naming conventions easy to remember so that they identify you, your representative firm or manufacturing company. Cute or funny e-mail address names detract from the professionalism of the senders and their companies.
- **Availability:** E-mail must be accessible from out of office and out of town locations. Check your e-mail on a regular basis. (Note: for representatives that are outside the office making sales calls or out of town, checking e-mail more than once a day may be unrealistic.)
- **Storage Size:** As messages are becoming longer, a minimum of 5-megabytes of storage is required. In addition, the increased use of multimedia (such as sound or video) will also affect your storage needs. The amount of storage space and the maximum space needed for messages are different. Make sure you have plenty for each.
- **Reputation and Financial Health of the ISP:** Use a provider that has a good reputation and staying power, based on a large customer base and financial stability.
- **Domain Name:** Register your domain name to add professionalism to your e-mail address—it represents you and your company
- **Bulk E-Mail Sifter:** A sifter identifies bulk or unsolicited mail and stores it in a special folder (this feature can very convenient). Check with your ISP and see if they provide or offer spam filters.
- **Using Free E-Mail Services:** If you are using a free service, be prepared to see banner advertisements and splash offers.

- **Out of Office Message Capability:** This feature allows you to send an “out of the office” message to alert e-mailer senders that you are not available and will take some time to get back to them.
- **Compatibility:** Use a provider that allows you to access your e-mail from a remote location, using someone else’s computer. Do not get locked into a system where you can only access your e-mail from your ISP on your own computer.
- **Control and Security:** It is useful to have an e-mail provider that allows you to add and change users, add passwords and makes these changes secure.
- **E-Mail Address Changes:** Do not change your address without notifying your key e-mail contacts.
- **Speed:** Select an e-mail provider that offers high-speed connections.
- **Subject Lines:** Use a subject line when e-mailing. Make the subject line meaningful and concise. Subject messages allow the recipient to efficiently sort, understand, respond and file e-mail messages.
- **Message Content:** Messages, like subject lines, should be to the short and to the point. Try to keep to the subject at hand and use correct grammar and spelling. Always proof and/or spell-check your message.
- **Replies:** Include enough of the original message to provide specific context for the original sender. E-mail is not as immediate as a telephone conversation and the recipient may not recall the contents of the original message. Include only the minimum amount of information you need from the original message. It is inefficient and annoying to have the entire original message quoted back to you. Ask yourself if a reply is really warranted. Use “reply to all” only when necessary.

Conclusions and Recommendations

Manufacturers and field sales representatives are increasingly looking for mechanisms and technological advances that will streamline communications and enhance their business relationships. With the advent of the Internet and e-mail, manufacturers and representatives have found a new way to communicate that can be fast, cost-efficient and productive.

However, these communications advance have their pitfalls. How many times at an electrical industry meeting does someone mention that they spent an hour at the end of their workday reading, responding to and/or sending e-mails? Until recently, practical solutions to e-mail overload have been few.

In these guidelines we suggest user strategies in dealing with overload. We recommend that information overload become self-policing between manufacturers and representative organizations. While there are recent developments in e-mail strategies, such as intelligent software agents that can cope with e-mail overload, we suggest plain old common sense.

In the broadest terms, these Guidelines recommend common sense strategies for electronic communication:

- The use of technology and electronic communication should be efficient and cost effective.
- Recognize that communication and reporting via e-mail requires mutual planning, cooperation, teamwork and monitoring.

- The selection and use of compatible hardware and software systems that makes the relationship between the manufacturer and representative more productive.
- Training in the use of computers, software, e-mail communication and Internet access is an investment in professionalism and efficiency.

Final Notes: Now and Into the Future

Conventional wisdom established that Internet commerce would revolutionize the way companies sell to service and support customers. Since many high-profile Internet portals came on the scene, the Internet has certainly changed some traditional commerce practices. However, these changes have not followed the forecasts of cyberspace pundits. Having initially been seen as the demise of traditional sales, Internet commerce has been a catalyst for new sales strategies that will link all of a company's selling processes and channels.

The first phase of Internet commerce sought to "disintermediate" transactions from sales representatives, which facilitated commerce between customers, and manufacturers. In some cases, software agents replaced sales agents with the intent of reducing overhead costs and giving customers direct access to suppliers. However, in many of these same situations customers wanted the option to work through questions with a support person on the telephone or in person.

Now, even high-profile Internet commerce sites are moving toward this model of offering call back features that connect the customers with inside sales in the case of manufacturer's representatives or factory customer support. In addition, many products, especially in the electrical industry, are custom-engineered or specialized by manufacturers to meet the needs of their customers.

At the same time, manufacturing companies are struggling to manage a variety of direct, field sales and partner sales channels. This is where the Internet can help both the manufacturer and the field sales representative. Manufacturing companies of all sizes now must manage two or more sales channels, each of which has its own processes. The most difficult problem is ensuring that all participants in the sales process are "on the same page" on a customer account. The Internet can provide a foundation upon which to solve the information portion of this problem. As well as, supporting the proactive selling processes that representatives perform, the Internet supports other new concepts of marketing and selling. Thus, far from being the death of conventional sales, the Internet has become a valuable tool for both manufacturers and representatives in their efforts to facilitate sales in various channels.