

# Food Service Industry Roles

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## **FOOD SERVICE EQUIPMENT AND SUPPLY INDUSTRY SEGMENTS PERFORMANCE RECOMMENDATIONS**

The original performance recommendations were developed in the early 90's by members of the FCSI/NAFEM Liaison Committee. These recommendations were reviewed in 1994 by a group of industry leaders from all five major trade associations in the food service equipment, supplies and furniture industry: CFESA, FCSI, FEDA, MAFSI & NAFEM and revised as necessary. In the spring of 1998, leaders from all five associations were asked to update these recommendations to meet today's marketplace realities. These revised performance recommendations reflect all updates received and serve as a reference in conducting your business with your partners.

### **REPRESENTATIVES**

#### **Representatives' Recommendations For Manufacturer's**

- Treat representatives as your strategic partners - as your customers
- Provide specific sales and marketing support - Go to market as a team
- Provide training on equipment & demonstration; applications; and competition
- Make quality equipment with good value
- Establish mutually agreeable territory quotas
- Do not penalize representative's commissions because of unilaterally make sales/marketing decisions with end users, buying groups, dealers and other customers
- Do not sell to unqualified organizations or people
- Spend your representatives time wisely
- Provide adequately sized and thoroughly trained inside sales/customer service and technical teams
- Have an excellent system of communication with representatives
- Introduce new products in a well planned fashion
- Pay commissions on time according to contract and provide complete and accurate commission statements
- Provide complete and accurate specifications sheets, price lists, sales literature and acknowledgments
- Do not accept orders that does not include the Specifier Identification System (SIS) alpha-numeric identifier suffix after every model number
- Invest in new product development
- Provide up-to-date order and shipment reports under partnership development
- Make correct and timely shipments - notify representative of any production and/or shipping delays
- Have a sales-oriented credit philosophy
- Establish a representative council
- Furnish contracts longer than 30 days
- Understand the representatives' business
- Use technology to communicate with representatives on production/shipments/commissions to eliminate unnecessary phone calls between representative and factory. This leaves more time for selling!
- Incorporate revised Start Up & Demonstration guidelines as outlined in Principals of Decision
- Use Principals of Decision guidelines and articles in developing trusting relationships with your representatives

#### **Representatives' Recommendations For Consultants**

- Be open minded to representatives products
- Write clear specifications using your specifier identifier suffix for each product specified as outlined in the new Specifier Identification System (SIS)
- Use SIS to aid representatives in obtaining specification credits with manufacturer's and in assisting the ultimate customer
- Write brand specific specifications, not generic specifications, when possible
- Adhere to specifications
- Be accessible for learning about new products

- Consider reliability, durability and service to be part of the products price
- Support those representatives who support you as an ethical and professional partnership
- Be fair on punch lists
- Incorporate revised Start Up & Demonstrations guidelines as outlined by FCSI/MAFSI/NAFEM

### **Representatives' Recommendations for Dealers**

- Try to make dealer's sales staff available for sales meetings with representatives
- Provide leadership to your sales team in their dealings with representatives and factories that you support
- Support those representatives who support you as an ethical and professional partnership
- Provide general specifications, item specifications and related drawings for those projects needing quotation
- Include the Specifier Identification System (SIS) alpha-numeric identifier suffix after every model number in specification
- Allow adequate lead time for quotations
- Do not product substitute on specifications without authorization
- Pay promptly
- Incorporate revised Start Up & Demonstration guidelines as outlined by FCSI/MAFSI/NAFEM by scheduling adequate time for demonstrations, providing equipment start-up by authorized service agency or dealer, verify completion of installation prior to demonstration, and have a salesman present for the representatives demonstration

### **Representatives' Recommendations for Service Agents**

- Train service staff at factory schools
- Provide continuing education for service staff and sub-agents
- Provide good sub-network of service for rural areas
- Contact factory for assistance
- Have an adequately sized staff
- Promote a good working relationship factory representatives
- Consider providing start-up and check out of newly installed equipment for which your service agency is authorized
- Use CFESA's guidelines for technicians service calls and conducting training
- Advise local representatives of dissatisfied customer

## **MANUFACTURERS**

### **Manufacturer's Recommendations For Representatives**

- Treat your factory as you strategic partners - understand their business and go to market together
- Invite factories to learn about your business - how it works, etc.
- Have knowledge of territory, including dealers, end users, and consultants
- Have product knowledge of: applications, performance, mechanical, electrical, plumbing, product comparisons, accessories (standard and optional)
- Provide field liaison and follow-through
- Participation in Rep councils to align representative and factory goals
- Be familiar with consultant's complete specification
- Provide skilled and complete demonstration training

- Have professionally trained field and inside sales and staff support
- Provide full market coverage in assigned areas
- Keep factory informed about competitive information, specific account potential, market potential, and developing trends
- Be the value link, the window to the marketplace for your factories

- Be a proactive problem solver and trouble shooter for your market area
- Be a good will ambassador by taking part in trade associations, providing liaison with code authorities and having general involvement in all facets of our industry in your market area
- Do not accept any orders without the Specifier Identification System (SIS) alpha-numeric identifier suffix after every model number
- Promote SIS to consultants, dealers and all specifiers
- Use Principles of Decision guidelines and articles in developing trusting relationships with your manufacturer's

### **Manufacturer's Recommendations For Consultants**

- Provide complete and accurate specifications using your SIS alpha numeric identifier suffix
- Understand manufacturer's products and applications
- Be up-to-date and knowledgeable
- Do not over-extend product performance expectations
- Be open minded and provide a forum for learning about new products
- Turn shop drawings around promptly
- Do not specify two brands as equals if they are not equal
- Do not equate price to value - consider reliability, service and durability
- Instruct kitchen equipment contractor (KEC) to provide the general specification, item specification and related drawings when obtaining quotations from factories
- Adhere to specifications
- Lay responsibility for problems where they belong
- Try to referee any fallout between KEC, General Contractor or Owner
- In case of an error on someone else's part, keep lines of communication open
- Incorporate revised Start Up & Demonstration guidelines as outlined by FCSI/MAFSI/NAFEM

### **Manufacturer's Recommendations For Dealers**

- Show loyalty to manufacturer's
- Have a showroom/stock/warehouse
- Have knowledgeable and involved sales staff
- Be familiar with consultant's complete specification
- Be sure specifier's alpha-numeric identifier suffix follows all product numbers as outlined in the Specifier Identification System (SIS)
- Do not substitute for prime specifications
- Send a complete copy of specification for quotes, including all relevant requirements and drawings
- Send correct purchase orders to representatives or factories with all accessories
- Allow adequate fabrication lead time
- Verify manufacturer's parts acknowledgments
- Verify field dimensions
- Coordinate shipping, receiving and delivery of equipment
- Promptly inspect shipments for possible freight damage
- Maintain adequate capitalization/credit
- Pay promptly
- Use professional equipment installation crews
- Provide skilled and complete demonstrations as outlined in revised Start Up & Demonstration guidelines as outlined by FCSI/MAFSI/NAFEM

### **Manufacturer's Recommendations For Service Agents**

- Provide prompt, courteous, high quality service to our mutual customers
- Advise and update manufacturer's on any unusual field service problems
- Provide service assistance to customer via phone, fax, email as requested
- Follow up on service calls to ensure customer satisfaction

- Advise accountable people of incorrect or incomplete installation
- Submit accurate, complete and timely warranty service reports and invoices
- Use manufacturer's bulletins and training materials to keep staff professional, knowledgeable, and current
- Order, stock and use only OEM parts to ensure safety and proper repair
- Promptly order non-stock items, as requested
- Pay for part sales within manufacturer's specified terms
- Do not offer opinions to owner regarding kitchen design, dealers or brands

## **CONSULTANTS**

### **Consultants' Recommendations For Representatives**

- Know your product, its applications and its competition
- Make useful and educational presentations and demonstrations
- Provide product application information
- Indicate product feature/benefit relationships
- Do not make end-user contact regarding specification changes during the bidding process unless mutually agreed by all parties involved
- Provide up-to-date catalogs and price lists
- Advise of changes in specifications
- Provide submittals for equals/substitutions in accordance with project bid documents
- Bring problems and questions to consultant before going to owner
- Keep in reasonable personal contact
- Provide follow-up/problem resolution
- Call consultant for appointment
- Provide proper training for dealer personnel to demonstrate care of equipment use

### **Consultants' Recommendations For Manufacturers**

- Have knowledgeable sales representation
- Develop a network of high quality, factory-oriented service agencies
- Have a knowledgeable internal technical support staff
- Have an ethical marketing and sales strategy
- Provide prompt and accurate assistance for: specifications, technical questions, special applications and trends
- Provide complete and accurate specification sheets
- Follow FCSI/NAFEM specification sheet format recommendations
- Provide technical updates
- Verify accuracy of consultant's specifications, including use of the Specifier Identification System (SIS) alpha-numeric identifier suffix after all product numbers
- Strive for product reliability and improvement
- Establish all support activities prior to introduction of new products
- Produce shop drawings promptly
- Meet agreed ship and start-up promises
- Provide well written owner manuals
- Provide video tapes of equipment maintenance and operational procedures
- Advise of changes in specifications

### **Consultants' Recommendations For Service Agents**

- Stress professionalism and education for entire staff
- Have sufficiently trained staff and parts inventory for manufacturer's for which yours is a factory authorized service agency
- Report to manufacturer any changes in equipment fabrication or components that affect reliability or serviceability

- Report to consultant on recurring problems with particular equipment
- Do not offer opinions to owner or owner's staff regarding the quality, size, type or manufacturer of installed equipment
- Report to representatives on recurring problems with particular equipment

### **Consultants' Recommendations For Dealers**

- Understand and respect specifications
- Do not make unauthorized substitutions
- Ask questions on "gray areas" prior to the bid date
- Do not request post-bid substitutions
- Report problems first to consultant
- Send complete specifications and drawings to representatives of manufacturer's for quotations
- Furnish correct and timely purchase orders
- Provide prompt and complete submittals
- Adhere to project schedule
- Make accurate field dimensions
- Maintain adequate capitalization and credit lines to sustain project completion
- Minimize change order activity
- Provide proper installation
- Provide coordination for in-service demonstrations
- Have the contract representative present during demonstrations
- Follow through on service and installation problems
- Provide submittals for equals/substitutions in accordance with the project bid documents

## **DEALERS**

### **Dealers' Recommendations For Representatives**

- Have complete product knowledge
- Know your competitor's products
- Assist in training dealer sales personnel
- Indicate product feature/benefit relationships
- Assist with equipment demonstrations and training
- Provide field assistance with dealer sales calls when needed
- Assist with solving service problems
- Make timely catalog specifications and price updates
- Provide product application information
- Provide timely quotations
- Provide follow-up/problem resolution
- Provide customer leads

### **Dealers' Recommendations For Manufacturers**

- Have knowledgeable sales representation
- Utilize high quality service agencies
- Have a knowledgeable internal technical support staff
- Have an ethical marketing and sales strategy
- Provide assistance for: specifications, technical questions, special applications and trends
- Provide complete and accurate specification sheets
- Be familiar with industry's view of distribution

- Strive for product reliability and improvement
- Establish all support activities prior to introduction of new products

- Acknowledge purchase orders promptly
- Produce shop drawings promptly
- Provide advance notice of price increases
- Provide accurate and timely shipping dates
- Crate products to avoid damage
- Do not sell to non-qualified organizations or people
- Advise of changes in specifications

### **Dealers' Recommendations For Consultants**

- Be open minded
- Understand product applications
- Provide clear specifications and drawings
- Provide prompt turnaround of shop drawings
- Treat dealers equally with punch lists
- Minimize the number of equals specified
- Allow enough time to bid a project
- Communicate with the dealer frequently during the installation period
- Process and pay requests promptly

### **Dealers' Recommendations For Service Agents**

- Do not sell new or used equipment
- Have knowledgeable service technicians
- Stock as many key parts as possible on service trucks to avoid second trips
- Provide quick response times
- Report status of repair work to the dealer requesting the service
- Do not make adverse comments to the owner regarding the quality of equipment or manufacturer
- Do not perform warranty work that is not authorized by the manufacturer

## **SERVICE AGENTS**

### **Service Agents' Recommendations For Representatives**

- Schedule regular visits to service centers
- Understand what is included and not included in product warranties and explain it to the owner
- Provide suggestions on how to better serve our mutual customer
- Participate in local service councils
- Assist in training service and parts personnel on your products
- Contact service agency regarding upcoming installations or large sales to discuss required parts stock
- Provide advance start-up date in accordance with revised Start Up & Demonstration guidelines as outlined by FCSI/MAFSI/NAFEM

### **Service Agents' Recommendations For Manufacturers**

- Provide product information and training for service agency parts and warranty personnel
- Provide trained technical support staff
- Implement field service training programs, complete with video training tapes
- Provide suggestions on how to better serve the customer

- Provide clearly written detailed parts and service manuals and schematics, including periodic and preventive maintenance schedules
- Distribute service/parts manual prior to releasing new equipment
- Price replacement parts on a competitive basis with generic parts

- Keep minimum order for parts reasonable
- Eliminate drop-shipment charges
- Pay warranty claims within terms
- Negotiate contracts for longer than 30 days
- Provide for annual slow-moving stock returns without penalty
- Assist in training service and parts personnel on your products

### **Service Agents' Recommendations For Consultants**

- Specify that new equipment start-ups be performed by the authorized service agency
- Specify that the dealer be present during demonstrations in accordance with the revised Start-Up & Demonstration guidelines as outlined by FCSI/MAFSI/NAFEM
- Specify that all equipment warranties be explained to the owner
- Provide the service agency with a punch list relating to special concerns on new installations
- Provide suggestions on how to better serve our mutual customer
- Participate in local service councils

### **Service Agents' Recommendations For Dealers**

- Provide suggestions on how to better serve our mutual customer
- Be knowledgeable of local service support before selling a piece of equipment
- Educate sales staff on product warranties
- Schedule regular visits to local service agency
- Advise service agency of new facility openings
- Provide equipment lists for new installations
- Confirm complete installation of new equipment before requesting start-up
- Provide advance notice of new equipment start-up date in accordance with the revised Start Up & Demonstration guidelines as outlined by FCSI/MAFSI/NAFEM
- Explain manufacturer's periodic and preventative maintenance procedures to the owner
- Investigate service problems thoroughly before drawing conclusions
- Participate in local service councils
- Do not sell parts
- Understand what is included and not included in product warranties and explain it to the owner

## **STATEMENT ON CHANNELS OF DISTRIBUTION**

The industry currently defines distribution as a manufacturer's product channel to the end user. The manufacturers' representative is not part of the distribution channel unless taking title of the product and reselling it which is dictated by some manufacturers. However the manufacturers' representative is part of the channel of communication. Ultimately the end user will dictate all forms of channel distribution.

### **15 Channels of Distribution**

- Manufacturer/representative ⇒ Dealer ⇒ End user
  
- Manufacturer/representative ⇒ Chain
  
- Manufacturer/representative ⇒ Refrigeration dealer ⇒ End user
  
- Manufacturer/representative ⇒ Stocking representative ⇒ Dealer ⇒  
End user
  
- Manufacturer/representative ⇒ Buying group ⇒ Dealer ⇒  
End user
  
- Manufacturer/representative ⇒ Broadliner ⇒ End user
  
- Manufacturer/representative ⇒ Designer ⇒ End user
  
- Manufacturer/representative ⇒ Ice machine dealer ⇒ End user
  
- Manufacturer/representative ⇒ Master distributor ⇒ Dealer ⇒  
End user
  
- Manufacturer/representative ⇒ Master distributor ⇒ Chain
  
- Manufacturer/representative ⇒ Fabricator ⇒ Dealer ⇒  
End user
  
- Manufacturer/representative ⇒ Fabricator ⇒ Chain

Manufacturer/representative	⇒	Catalog house	⇒	End user
Manufacturer /representative	⇒	Chain purchasing (Pepsico)	⇒	Chains
Manufacturer	⇒	Wholesale club	⇒	End user