

Outline for Proposed
Sales Training Program
Tentative - For Discussion Purposes

MERGENTHALER LINOTYPE COMPANY

GEORGE FRY & ASSOCIATES
INCORPORATED
CHICAGO • NEW YORK

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April 20, 1949

GEORGE FRY & ASSOCIATES

INCORPORATED

Consulting Management Engineers

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New York
April 21, 1949

Mr. W. H. Griffin
Director of Sales
Mergenthaler Linotype Company
29 Ryerson Street
Brooklyn, New York

Dear Mr. Griffin:

The following outline was prepared for discussion purposes. It covers our tentative conclusions as to the nature and scope of the training activities to be included in the sales management program.

At a meeting held on April 14, in your office and attended by yourself and Messrs. H. L. Gage, W. B. Patterson, R. F. Dick, R. E. Ball and L. F. Lilliston, it was decided that Messrs. H. L. Gage and W. B. Patterson should prepare one unit of the sales training course to serve as a model for discussion of format, style and method of presentation.

Copies of this outline have been prepared for Mr. Gage and Mr. Patterson. We understand that you will pass their copies on to them.

Sincerely yours,

George Fry & Associates

I. SCOPE OF TRAINING ACTIVITIES

- A. Initial training for all new salesmen and servicemen.
- B. Re-training for all present salesmen and servicemen.
- C. Continuing training for all salesmen and servicemen.
- D. Training as required for all other Company personnel who come in direct contact with the trade. Establishment of this phase of the training program must await final determination of Company organization.
- E. Training of trade personnel, such as operators and machinists.

II. TRAINING OBJECTIVES

A. Salesmen

1. Provide salesmen with the mechanical, typographical, and technical information necessary for them to do an effective selling job.
2. Provide salesmen with information as to the most effective methods for selling machines, parts and matrices, taking into consideration differences in the composing problems in various types of plants.
3. Indoctrinate salesmen in Company policies, methods and products and strengthen desirable attitudes toward the Company, its products and their jobs.
4. Give salesmen complete information on all approved Company forms and procedures used in their work and on the basic use made of these records in order to give them a basis for accurate and intelligent handling of orders, contracts, sales reports and other procedures.

5. Provide salesmen with information on the products and selling and distribution methods of competitors and give them specific instructions on how to meet competitive selling activity.
6. Educate the salesmen as to what selling helps and aids are available to them and induce them to make the fullest use of these helps and aids.
7. Explain to the salesmen what is expected of them and how they can most easily meet these expectations.
8. Increase sales by having salesmen better able to meet the trade's needs by having them obtain sales that would otherwise go to competition and by having them equipped to develop new markets or expand and more fully exploit old markets.
9. Provide an increasing number of salesmen who are thoroughly trained and indoctrinated in industry composing needs and Company sales methods and from whom sales supervisors and executives can be selected.

B. Servicemen

1. Provide servicemen with the mechanical, typographical and technical information necessary for them to do an effective erecting and servicing job.
2. Provide servicemen with information on the most effective, economical and practical ways of erecting and servicing all linotype machines.
3. Indoctrinate servicemen in Company policies, methods and products and strengthen desirable attitudes toward the Company, its products and their jobs.
4. Give servicemen information on all forms and procedures used in their work and on

the basic use made of these records in order to give them a basis for accurate and intelligent handling of necessary paper work.

5. Explain to the servicemen what is expected of them.
6. Increase sales by instilling in the servicemen a sales attitude by equipping them to handle sales situations that arise in their presence and by training them to sense sales possibilities that should be referred to a salesman for follow-up.
7. Educate the servicemen in the fundamentals of selling, emphasizing what should and what should not be said to customers.

III. SUBJECT MATTER - SALESMEN TRAINING

A. The Industry

1. Nature and scope of the graphic arts industry.
2. Classification of establishments.
3. Number and geographical distribution of establishments.
4. Importance of each classification to the Mergenthaler Company and reasons.
5. Future trends and developments in the industry as they affect the Mergenthaler Company.
 - a. Economic factors.
 - b. Technological factors.
6. Basic composing problems of different types of customers and differences in their organization: Why they must be handled in different ways.

B. The Company

1. History and development of the Company.
2. Basic policies and objectives of the Company.
3. The organization of the Company.
 - a. Over-all plan of organization. Responsibilities of major divisions and departments.
 - b. Detailed organization of the sales division.
 - c. The salesman's position in the Company and the relationships between his work and that of others.
4. Company manufacturing facilities and methods.

C. The Product

(The information presented in this section of the training course must cover many technical and mechanical details, but should be strongly oriented toward selling situations. Every effort should be made to avoid a theoretical, engineering or bookish approach and to show the relationship of each subject to the practical selling problems encountered by the salesman.)

1. The Linotype Machine
 - a. Current models
 - (1) Basic characteristics of model.
 - (2) Applications for which suitable.
 - (3) Corresponding Intertype model--similarities and differences.
 - (4) Sales arguments to use against competition.

- (5) Obsolete models which new model replaces.
- (6) Mechanical features. How to handle minor service adjustments. Mechanical questions frequently asked salesmen. When to refer customer to a serviceman.
- (7) Typographical features (tie in with section on matrices).

b. Obsolete models

(Cover same material as above in much less detail. Stress relationship to present models and how to induce customer to replace obsolete machine.)

2. Attachments (cover following for each attachment).

- a. Purpose of attachment.
- b. Applications for which suitable.
- c. Competitive attachments.
- d. Selling points to stress.
- e. Mechanical features. How to handle minor adjustments. How to answer common service questions. When to refer customer to serviceman.
- f. Typographical features (if any).

3. Matrices

- a. General background on typography.
- b. Principal linotype and competitive faces.
- c. Factors governing the selection of a type face in various applications.
- d. Readability and legibility--research findings as applied to the sales of matrices.

e. ATF, Monotype and other faces.

4. Parts

- a. Parts sales as a service function.
- b. The nature and scope of the Company distribution system for parts.
- c. Competitive parts manufacturers-- their selling and distribution methods. How to meet competitive activity.

D. Sales objectives and policies.

1. Basic sales objectives of the Company.

- a. Volume objectives.
- b. Relative market position objectives.
- c. Specific objectives with respect to various classes of customers.

2. Sales policies

- a. Prices and pricing.
- b. Contracts.
- c. Rentals and loans.
- d. Credit, terms and collections.
- e. Scheduling and order preference.
- f. Guarantees.
- g. Trade-ins and allowances.

E. Selling methods

1. Fundamentals of a satisfactory sales performance.

- a. Necessity for doing a well-rounded selling job with equal emphasis on machines, parts and matrices.
- b. Importance of customer service as a sales influence.

- c. Importance of creative salesmanship to demonstrate customers' need for new equipment.
 - d. Importance of accuracy, completeness and punctuality in the preparation and forwarding of orders, sales reports and other required paper work.
2. Organizing the selling job.
- a. Who are eligible and desirable prospects?
 - b. Planning coverage of accounts.
 - c. Planning sales effort to gain maximum effectiveness from each call.
 - d. Planning sales effort to overcome competitive activity.
 - e. Planning territory coverage for maximum effect at minimum cost.
 - f. Coordinating personal sales effort with Company advertising, sales promotion and sales engineering activity.
3. Handling selling situations.
- a. Basic differences in the appeals used in selling various types of customers.
 - b. Basic selling points to emphasize.
 - c. Most frequently encountered sales objections and how to meet them.
 - d. Sales approaches to use on all Intertype plants.
 - e. Use of demonstrations.
 - (1) When and how to use.
 - (2) Where conducted.
 - (3) How to make necessary arrangements.

- f. Use of plant surveys and typographic surveys.
 - (1) When to use them.
 - (2) Procedure to follow.
- g. Calling on Agency Manager for assistance.
 - (1) The role of the Agency Manager in the salesman's work.
 - (2) When to call on the Agency Manager for assistance.
- h. Integrating salesman's work with Company advertising and sales promotion activity.
 - (1) Relationship between salesmen and the Advertising and Sales Promotion Department.
 - (2) Using Company literature and sales aids to best advantage.
 - (3) Using direct mail campaigns.
- i. Case histories illustrating typical selling problems and how they were handled.

IV. SUBJECT MATTER -- TRAINING FOR SERVICEMEN (In preparation)

V. TRAINING METHODS

A. Initial training for new salesmen.

1. Preliminary indoctrination at Agency.

a. General introduction to the Company including presentation of following sections of training course:

- (1) Section A - "The Industry".
- (2) Section B - "The Company".

- b. Thorough review of new salesmen's existing technical information in order to determine elements to stress in product training -- this information to be submitted to Training Director in Brooklyn.
2. Product training at Brooklyn.
- a. Tour of factory showing processes and inspections involved in manufacturing operations.
 - b. Presentation of Training Section C - "The Product."
 - c. Examination on product knowledge. Training Director will not release salesmen to Field until acceptable standard of product knowledge has been met. Report on salesmen's accomplishment on this phase of training program should be forwarded to Agency Manager.
3. Sales training at Agency.
- a. Presentation of Training Section E - "Selling Methods".
 - b. Field work with several of best-qualified salesmen to observe them in operation.
 - c. Final review at Agency.
 - d. Examination on selling methods.
 - e. Report on completion of initial training to Training Director.
- B. Initial training of new servicemen.
(in preparation)
- C. Re-training of present salesmen.
- 1. Dissemination of printed training units to salesmen as they are completed.
 - 2. Brief check examinations on material presented in training units.
 - 3. Sales meetings.

VI. Training Materials

A. Salesman's Book of Information.

This should be primarily a source of information on Company and competitive products on prices and other technical data. Information on Company policies, procedures and selling methods should be put in the Salesman's Manual where they can be considerably expanded and presented in better form.

B. Salesman's Manual.

This should concentrate on Company policies and procedures and on how to sell.

C. Service Manual.

This should be a technical instruction book on how to erect, service and repair all current Linotype models and such important obsolete models as the 5, 8, 14, etc.

D. Typographic Manual.

This manual should summarize, in convenient form, the typographic information which the salesman needs. In conjunction with the specimen books, it should enable him to answer the majority of the typographic problems which he meets.

E. Sales and Service Bulletin.

This should be a monthly or bi-monthly periodical. It should be used both as a training medium and a means of disseminating information. As a training medium it should include brief informative articles on pertinent sales and service subjects. It will provide a means for re-emphasizing subjects on which complaints or Agency Managers' reports show the salesmen or servicemen to be weak. As an information medium it should be used to announce new products, new policies, changes in organization, etc. It should include two question-and-answer columns-- one for sales problems and one for service problems.

F. Large-scale charts, diagrams, blow-ups, etc.

These should be prepared to illustrate and dramatize training conferences for both salesmen and servicemen.

G. Training Manual.

This manual should be prepared for Agency Managers and Assistant Managers and should cover their part in the training program. Instructions should be included covering each step in the training process.



