

Experience Guideline for Sales Engineering

PURPOSE

- To create clear guidelines for Sales Engineers to qualify which experience is or is not engineering experience within the discipline of engineering through which the applicant is applying
- To create guidelines for the interpretation of Sales Engineering experience to enable an applicant to self-assess their work and reviewers to assess an applicant's work as appropriate engineering experience within the discipline through which the applicant is applying.

PROPOSED GUIDELINE

This document defines those activities in Sales Engineering that are acceptable engineering experience for the purpose of qualifying experience that fulfills APEGBC's Satisfactory Engineering Experience Requirements.

APEGBC intends this document to be used by both:

- The applicant to analyze their experience and whether it is acceptable engineering experience; and
- The Association to evaluate an applicant's experience and whether it is acceptable engineering experience.

Applicants whose sole experience has been in the Sales Engineering will be evaluated carefully to ascertain if the satisfactory experience requirements have been adequately met. It is possible for these requirements to be met solely by Sales Engineering and the onus is on the applicant to demonstrate how they meet the experience guidelines. If professional competency guidelines exist for the Applicant's discipline, these will be used in the assessment. Such guidelines provide for a more fair and objective measure of the applicant's qualifications.

Applicants ARE advised to take a position for a period of time that involves application of theory and/or covers other satisfactory experience requirements.

Requirements

A Sales Engineer is not merely a salesman with technical knowledge that he or she imparts to potential buyers. Sales Engineers are the link between scientific discoveries and innovation and its commercial application. A Sales Engineer has intimate technical knowledge about the product or service he or she is selling and uses his or her engineering knowledge to scope a client's needs, a project's needs and any modifications, adaptations or innovations needed to ensure a product or service works for a client. A Sales Engineer sees a project through from the initial contact with a buyer, through scoping the project and selling the product or service stages to the project completion stages of installation, commissioning, turnover, ongoing maintenance and technical service. A Sales Engineer will identify technical issues and solve these problems prior to the sale or the installation, as well as handle technical issues at the installation, maintenance and technical service stages. A Sales Engineer will demonstrate meaningful application of scientific and engineering principles in his or her day-to-day work.

All applicants must meet APEGBC's Satisfactory Experience Guidelines to be registered.

Determine Client Needs

- Consult with the client regarding their needs and determine those products and services that could best meet their needs including

assisting the client to specify and detail their needs

- Consult with the client and determine how products or services could be designed, modified or adapted to suit their individual needs
- Advise the client how best to use a product or service
- Use technical skills to demonstrate to a client how and why a product or service would suit their needs, including demonstrating usefulness by analyzing how this product or service would increase production, save money or time, solve a problem or otherwise be beneficial

Determine the Scope of the Project and Project Needs

- Generate and supervise all inquiries, contracts and tenders
- Develop estimates for complex integrated systems, if applicable
- Analyze and Estimate material, labour, equipment and other project needs
- Perform site surveys to determine specific client needs
- Provide estimates for project labour, equipment costs, counts and so on
- Assemble permit packages where applicable
- Determine whether sub-contractors will be needed and create job estimates if so
- Provide technical descriptions and content for proposals, tenders and contracts

Communication Skills

- Communicate to clients the most effective way to use a product or service to meet their needs
- Communicate with clients to interest them in buying with a focus

on the technical aspects of the product or service and how it suits their needs

- Work in a team
 - to communicate client needs
 - to effectively implement a product or service for a client
 - to keep others abreast of available systems, products or services and their technical aspects
 - to act as a technical consultant during joint sales calls and visits
 - to solve client problems
- Develop and communicate product information through oral reports, presentations, and demonstrations
- Develop and communicate product information through written media such as vendor product information packages, manuals, cut sheets and other product documentation
- Provide technical descriptions and content for proposals, tenders and contracts
- Gather customer feedback to identify areas for innovation, adaptation, modification, redundancy and to identify any problems with a product or service

Installation and Maintenance Phases

- Assist in the implementation of a product or service and any customized solutions for the client
- Effectively undertake problem resolution and troubleshooting when problems arise during the installation or maintenance phases
- Provide operational and technical support and advice during the installation and maintenance phases

- Perform site visits and surveys to:
 - ensure project requirements are being met
 - ensure safety standards for the product or service are being met
 - ensure accuracy, including accuracy of parts, components, integration, service and so on
 - ensure quality standards are upheld
- Apply theories and principles of engineering, science and math to technical problems
- Assist, and oversee if applicable, any sub-contractors in the product or service requirements or implementation
- Facilitate project turnover including training clients in applying the technical products and troubleshooting problems

Product Information

- Have an intimate, in-depth and extensive knowledge of the product or service, including how it works, components, processes, how it was developed, how it is made, its advantages, disadvantages or limitations etc.
- Develop and maintain access to engineering design resources
- Stay abreast of and inform others on new product information including new technical aspects, new uses, and any advantages, disadvantages or limitations
- Develop media to effectively communicate product information including reports, presentations, demonstrations, pamphlets, brochures and other handouts

Innovation, Research and Development

- Identify new applications for existing and new products

- Develop new applications for existing and new products
- Identify, research and develop new innovations, alternative uses, modifications and adaptations for new or existing products or services
- Design complex integrated systems, if applicable
- Re-design or assist in the design of any innovations, modifications or adaptations to suit a customer's needs
- Apply theories and principles of engineer, science and math to technical problems and to the development of designs, modification and adaptations of new or existing systems
- Use customer feedback to identify areas for innovation, adaptation, modification, redundancy and to identify any problems with a product or service

Sales Techniques

- Consult with the client regarding their needs and determine those products and services that could best meet their needs
 - NOTE: this should be done in a 'consultative' style in which the Sales Engineer listens to the client's needs, determines for them which product or service would best meet those needs, focuses on the client's problem or need and how it could be solved or mitigated with their product or service.
 - Sales techniques should be performed with an emphasis on the Sales Engineer's technical knowledge and their analysis of how a product or service will address or mitigate a problem or provide an advantage
- Effectively communicate the advantages of a product or service and how it can best meet a client's needs
- Effectively communicate how a re-design, innovation,

modification or adaptation can be performed to address a concern or better meet a client's need

- Seek information on client concerns or awareness of product or service shortcomings
- Ensure customer satisfaction with a product or service
- Identify and take advantage of opportunities to present the features and benefits of a product or service

Environmental and Sustainability Concerns

- Promote the environmentally friendly factors of the product or service
- Promote the sustainability factors of the product or service
- Identify those areas that could be innovated, improved, modified or adapted to enable a product or service to be more environmentally friendly or to be more sustainable
- Develop those innovations, improvements, modifications or adaptations to enable a product or service to be more environmentally friendly or more sustainable

REFERENCES

U.S. Department of Labor: Bureau of Labor Statistics Occupational Outlook Handbook, 2008-09 Edition, Sales Engineers - <http://www.bls.gov/oco/ocos123.htm>

Canadian Professional Sales Association, The PROFILE Sales Assessment: CPSA Templates for Sales Personnel at 14 - <http://french.cpsa.com/PDF/src/Profile-Sales-Benchmarks.pdf>

Siemens Canada job posting for Sales Engineer on Workopolis.com, Job Title: Sales Engineer – Electrical, Siemens Building Technologies

Building Automation, Calgary, Posted July 7, 2008, #004024 -
<http://transpei.workopolis.com/EN/job/10013655>

Siemens Canada job posting for Sales Engineer on Workopolis.com,
Job Title: Sales Engineer, Siemens Building Technologies Fire Safety,
Calgary, Posted July 7, 2008, #004023 -
<http://transpei.workopolis.com/EN/job/10013679>

Chartered Status: Applicant's Handbook for Chartered Professional Engineer (CPEng) Chartered Engineering Technologist (CEngT) and Chartered Engineering Officer (CEngO) – at 33 Technical Sales and Promotion