

# North America

*Territory Manager & Key Accounts*

**SALES PLAYBOOK – 2026 / 2027**

# Welcome

EMPLOYEE NAME

We are pleased to have you join Gallagher in our Animal Management division as our new Territory Manager in <TERRITORY>.

Your first 90 days are about more than just getting started - they are the beginning of your Gallagher journey. You will learn, explore, and connect through a mix of hands-on experiences, learning resources, and team time designed just for you.

As you settle in, you will also have space to reflect on what excites you most and share your longer-term goals. That way, we can support not just your first steps here, but the future you want to build.

We are excited to see you grow and succeed with us, welcome aboard!

Kind Regards,

XXX

**Protect what  
matters most.**



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Section 01

# Getting Started

Company overview, purpose, values, and products, people

# Our Story

Gallagher is a proudly independent, intergenerational family-owned company

And since our earliest days this has been incredibly important in providing us the freedom to shape our business with a long-term vision. Our independence allows us to stay true to our values and make decisions that are right for our people, customers, and future.

We have two business units:

**Animal Management** – Solutions that enable farmers and rural professionals to manage livestock, land, and productivity.

**Security** – Advanced access control, perimeter, and intruder detection systems trusted worldwide.

We invest around 15% of our revenue into research & development every year, because great ideas don't come without investment. This focus drives the new solutions that will shape our future success.

Gallagher solutions are used in more than 160 countries. We export approximately 85% of the products we make in New Zealand, shipping them to our distribution hubs in Kansas City, Melbourne, Warwick, Netherlands, Brazil, Chile, and throughout Asia.

Our significant manufacturing facility in Hamilton, New Zealand includes tool & die, plastics, hardware assembly, electronics, print house, and distribution.

[Our Story](#) | [Sir William Gallagher, KNZM, MBE, HonD](#) | [Kahl Betham](#) | [Senior Leadership Team](#)

## Our Purpose and Values

# Protect what matters most.

Our purpose and our values apply to our extended Gallagher family including our employees, customers, partners and community.



## Our Vision

Paints a clear picture of what our business will look and feel like in three years, as we bring our purpose and strategy to life

## Strategy and Planning Frameworks

### Strategic Direction (Plan on a Page)

Defines our purpose – **to deliver world-leading animal and land management solutions that enable customers to operate responsibly, productively, and profitably**. It's grounded in global mega-trends impacting our industry and customers, alongside guiding principles for our actions.

### 5-Year Strategy

Outlines a path to success in fulfilling our purpose - a well-considered, achievable plan of action based on real insights and data.

### Annual Business Plans

Provides budgetary and actionable steps for the year ahead, aligning with our 5-Year Strategy.

### Quarterly OKRs

Breaks down the work and goals for the Annual Business Plan into realistic objectives for everyone at Animal Management. This ensures clarity on how each person's work contributes to the overall success of the business.

[Animal Management](#) | [Animal Management Strategic Direction](#) | [Goals and Key Results](#)

# Animal Management Plan on a Page

**FY27**

Apr '26 - Mar '27

Protect what matters most

**FY27 Focus Areas**

**FY27 AM Priority Outcomes**

**FY27 Measures**

**We deliver and sustain profitable growth**



- Scale AM core to \$348+ NZM  
Reset profit % while protecting and growing revenue
- Scale eShepherd to \$45+ NZM  
We are on a path to break even - then on to 10% profit



- Revenue: \$394.4 NZM
- Gross Margin: \$34.9 NZM

**We reduce cost-to-serve and operational complexity**



- Clear visibility of true end-to-end profitability by region and channel
- Focus our sales efforts to optimise growth and margin
- Create manufacturing and supply-chain efficiency
- Modernise IT systems to enable productivity and efficiency at scale
- Utilise AI to improve productivity



- Net Profit Before Tax (NPBT): +9.2 NZM
- Overheads % of GM: <63.8%

**We equip our team to meet evolving business needs**



- Embed globally consistent safety standards and leadership accountability across AM
- Strengthen leadership - Build the skills that matter most, and set our people up to succeed as we evolve
- Optimise efficiency through digital tools - i.e. portals, CRM, eCommerce



- My Voice Employee Engagement: +80%
- Net Promotor Score: Customer: 45 | Dealer: 42

**We build eShepherd and our "Future of Farm" ecosystem**



- Grow Annual Recurring Revenue (ARR)
- Scale eShepherd DTC model and specialist partner network
- Progress AM "Future of Farm"
- Foster cross collaboration between Edge and Core R&D teams to accelerate innovation



- ARR: \$3.5 NZM  
\$2.5 eShepherd | \$1 AP&T
- Future of Farm: Operating model defined

**We create customer-led product innovation**



- Customer insights and market fit to guide development
- Improve innovation cadence
- Focus on product portfolio profitability: rationalise non-performers, invest in the winners
- Improve go-to-market success



- Product Roadmap: 100% customer/market validated 6-12 months in advance
- Profitability: 2% improvement in Product portfolio GM %

# Gallagher in North America

## Animal Management

In the United States, our office and warehouse are in Riverside, MO.

### **Gallagher North America, Inc**

5005 NW 41st Street  
Riverside, MO 64150

Phone 816 421 2005

Toll-Free 800 531 5908

Fax 800 444 5422

Our Canadian warehouse is in Owen Sound, Ontario, Canada.

### **Gallagher Canada**

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Toll-Free 800 531 5908

Our North American team is a community of around 81 passionate people, all working together to deliver innovation and support to farmers across the country.



# PEOPLE:

## WHO's Who?

### Doug Jones, GM – North America



Doug Jones joined Gallagher as General Manager for Animal Management in North America in June 2022 based at our Kansas City office.

Doug's responsible for formulating a sales and development strategy to drive commercial success of, and for the many exciting projects and events we have lined up for, the Animal Management business in North America. Doug has had a successful career delivering results in a variety of industries, including consumer electronics, hardware, automotive, and outdoor sporting goods, and working for large international organizations as well as an entrepreneurial start-up business.

Doug grew up in rural eastern Nebraska on a small farm and graduated from the University of Nebraska with a degree in Management, as well as completing an MBA at Rockhurst University in Kansas City.

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# North America – Key Focus Areas (what we do)

**Sales Growth & Channel Expansion:** Drive revenue by optimizing distribution networks and expanding partnerships across the United States and Canada.

**Strategic Marketing Initiatives:** Enhance brand presence through targeted campaigns, digital outreach, and event participation tailored to regional customer needs.

**Operational Excellence:** Streamline supply chain processes, improve inventory management, and ensure timely product delivery to dealers and end-users.

**Financial Performance & Cost Management:** Monitor financial metrics, manage expenses, and pursue opportunities for profitability and sustainable growth.

**Customer/Technical Service & Support:** Deliver responsive, knowledgeable support, focusing on building loyalty and long-term relationships with producers, retailers, and distributors to maximize product performance and adoption.







**Employee Engagement & Development:** Foster a culture of growth, collaboration, and ongoing training across all functional teams.

# PEOPLE:

## WHO's Who?

### North America Leadership Team:

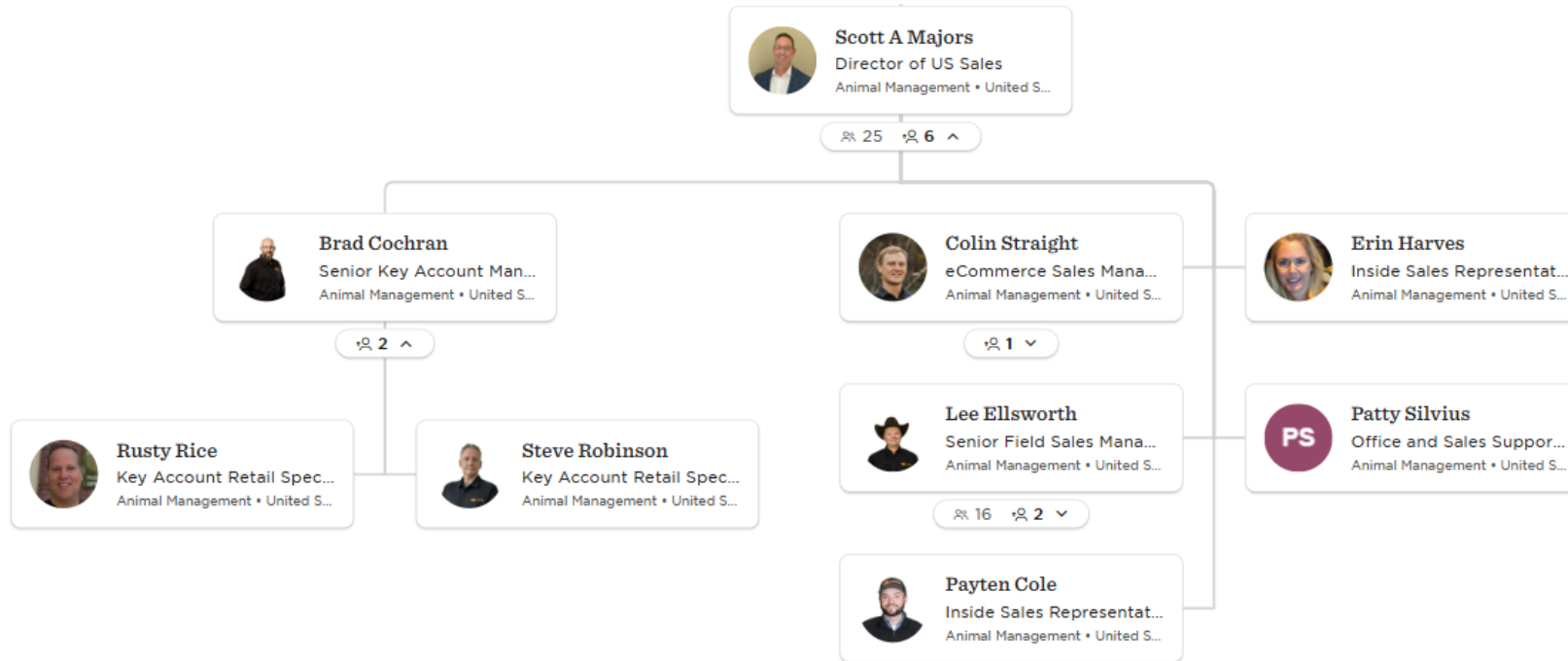
People reporting to Doug Jones

 <b>Amanda Allen</b> Regional Marketing Lead 3	 <b>James Vigliaturo</b> Director of Operations 13
 <b>Jeff Wilcox</b> Director of Product Management 2	 <b>Michael Koronis</b> Director of Sales - North 5
 <b>Scott A Majors</b> Director of US Sales 26	 <b>Scott Rooney</b> Director of Customer Service/Techni... 14

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## WHO's Who?

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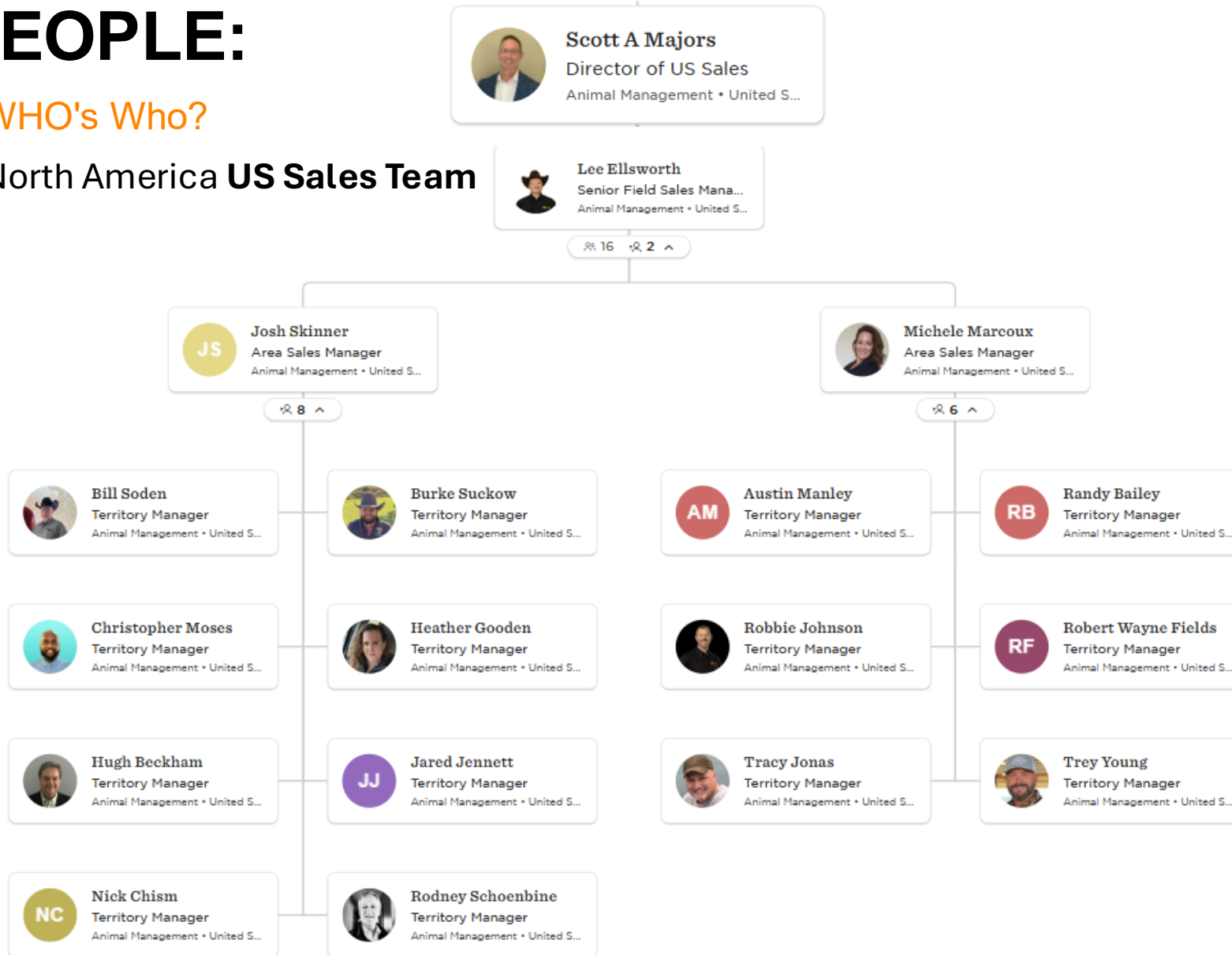
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NA Sales Playbook



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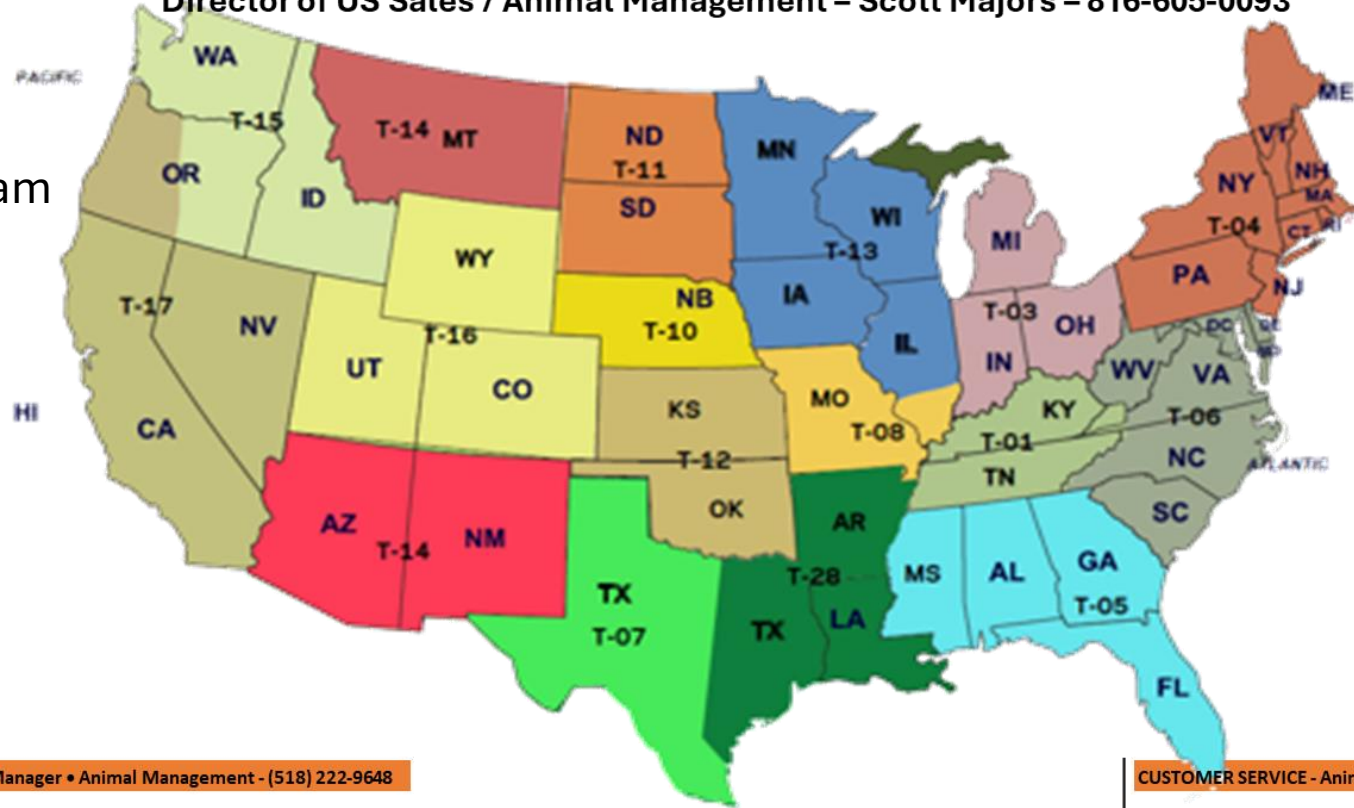
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### US SALES TEAM MAP

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# PEOPLE:

## WHO's Who?

### North America US Sales Team Territory Map

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**Scott Rooney - Director of Customer Support**

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- T16 Monica Hahn - (720) 525-9589
- T15 Austin Manley - (425) 736-7074
- T11 Tracy Jonas - (605) 574-0233
- T12 Robert Fields - (816) 244-5198
- T10 Robbie Johnson - (308) 870-0183
- T07 Trey Young - (806) 567-3258
- T14 Inside Sales

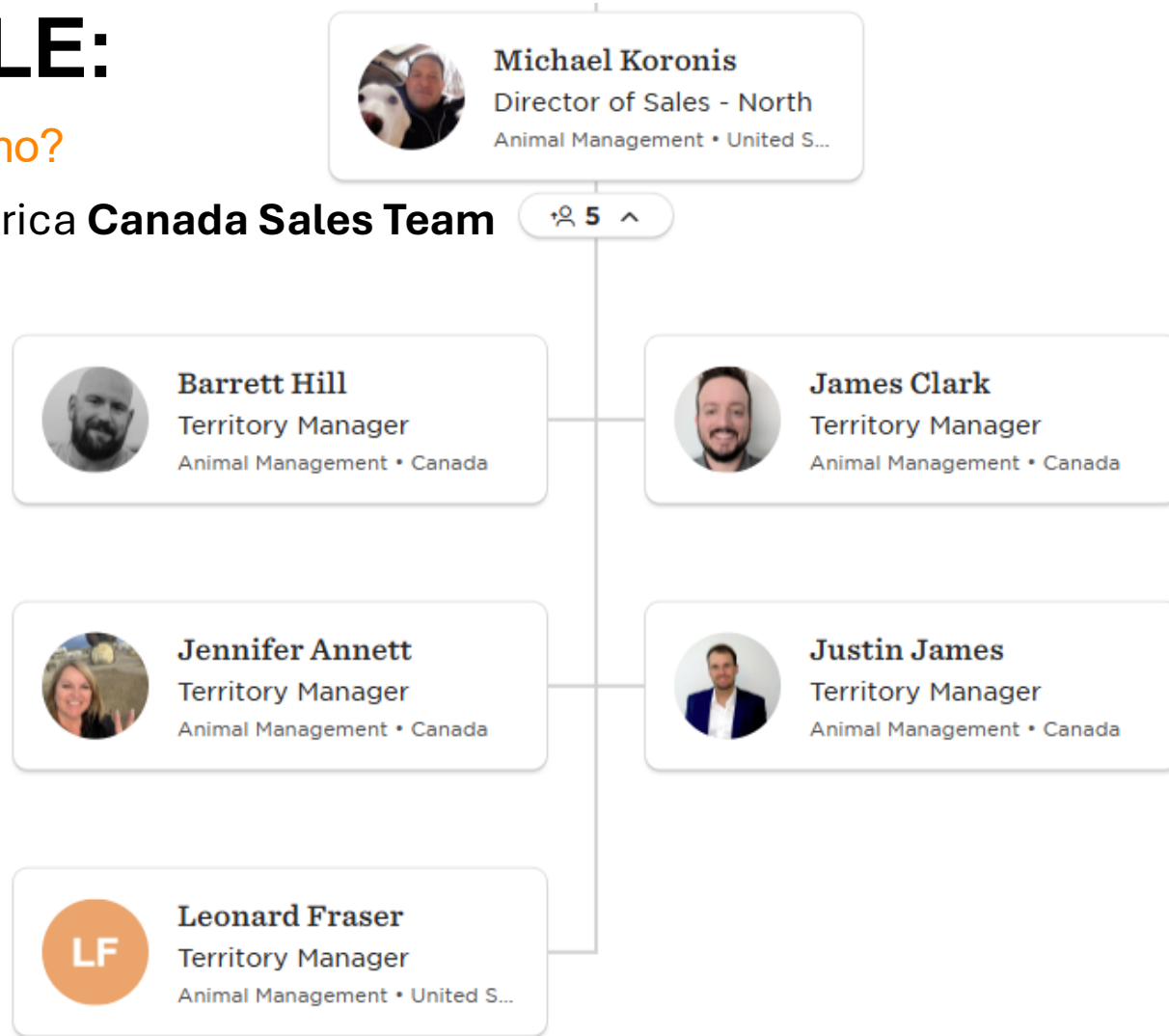
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- T01 Nicholas Chism - (270) 543-2954
- T06 Christopher Moses - (864) 772-0257
- T08 Jared Jennett - (417) 701-1972
- T05 Hugh Beckham - (816) 730-4232
- T28 Bill Soden - (816) 302-5360
- T13 Burke Suckow - (563) 929-3462

- Lisa Brandenburg - Customer Service Lead
- Enola Scrivens - Customer Service Rep.
- Linda Walker - Customer Service Rep.
- Ivan Hernandez - Customer Service Rep. / Bilingual
- Mackenzie Mehlhaff - Customer Service Rep.
- Magda Lugo - Customer Service Rep. / part time
- INSIDE SALES - Animal Management**
- Erin Harves
- Payten Cole

# PEOPLE:

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# CA SALES TEAM MAP

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# PEOPLE:

## WHO's Who?

### North America Canada Territory Map



OPEN  
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Leonard Fraser  
Jennifer Annett  
Barrett Hill  
Justin James  
OPEN

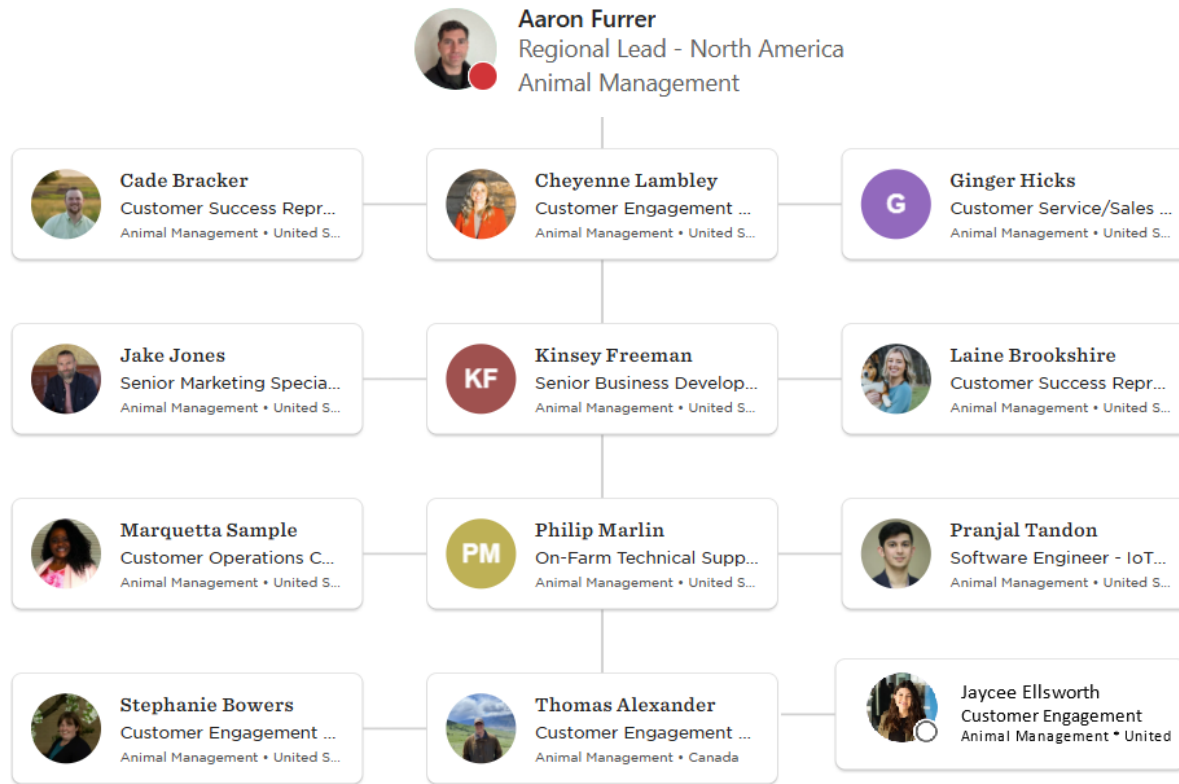
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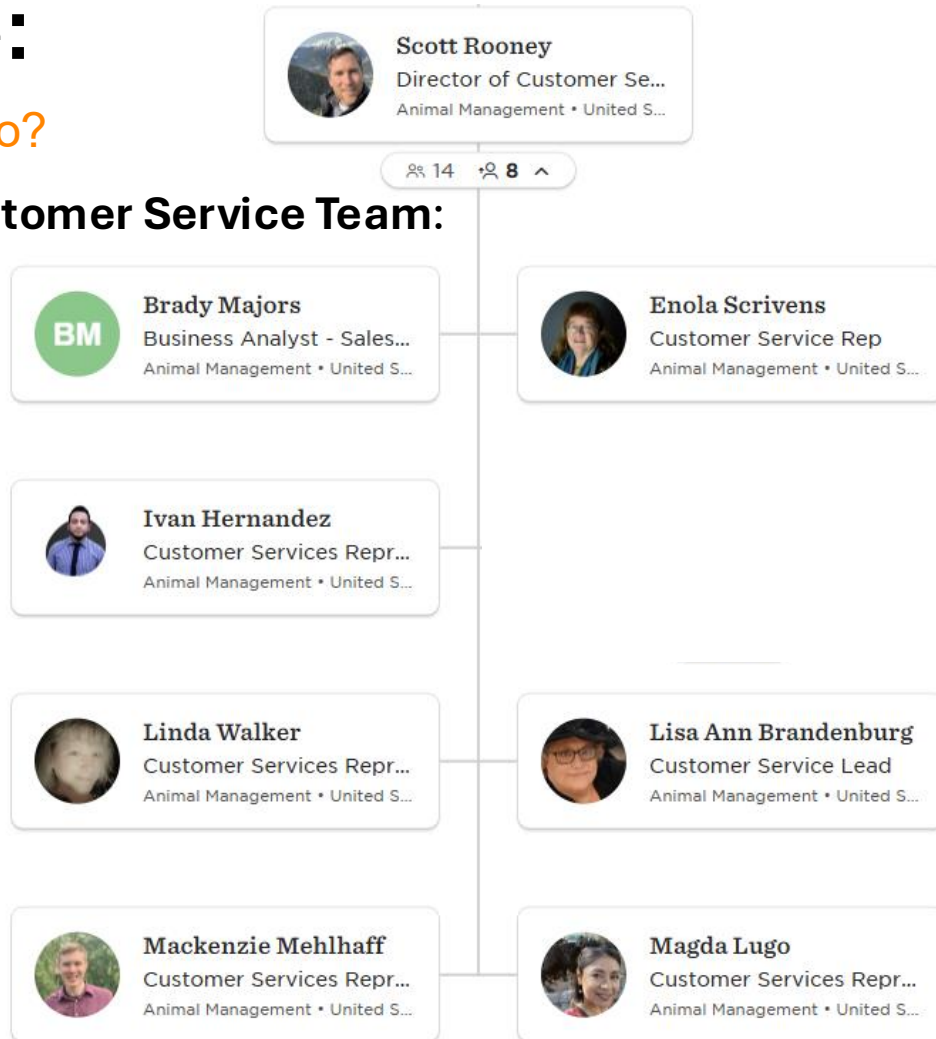
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## WHO's Who?

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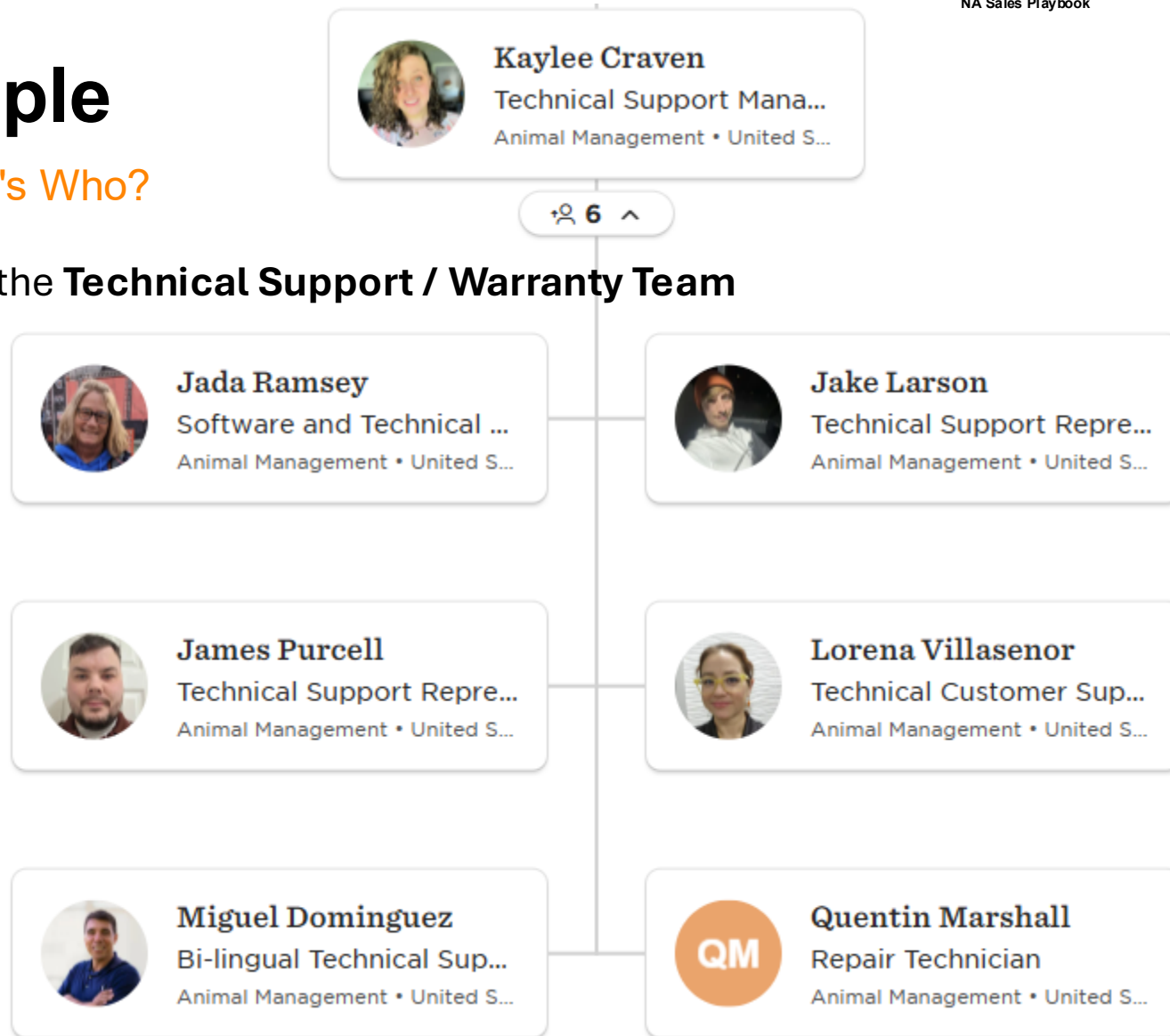
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## WHO's Who?

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NA Sales Playbook

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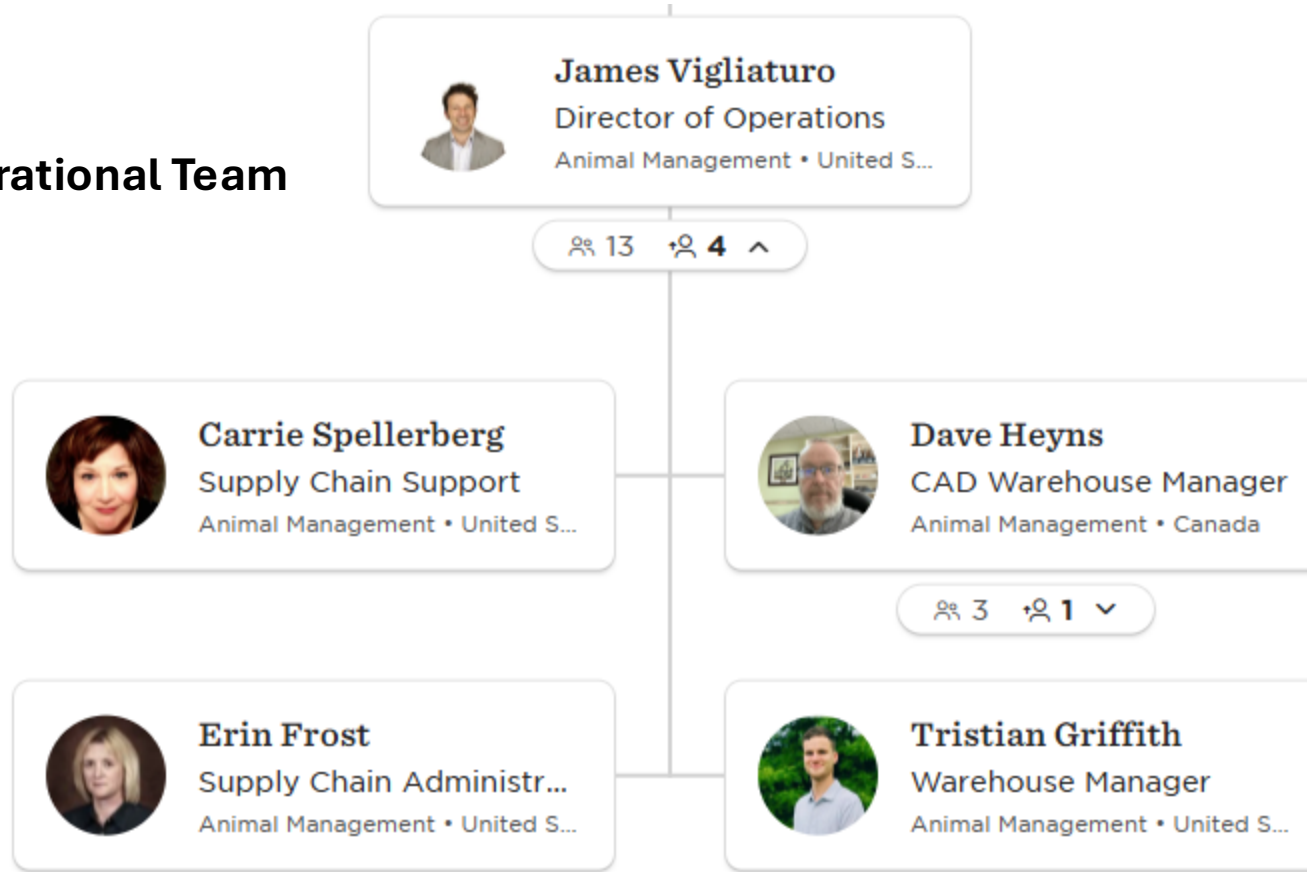
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# People

WHO's Who?

Meet the **Operational Team**



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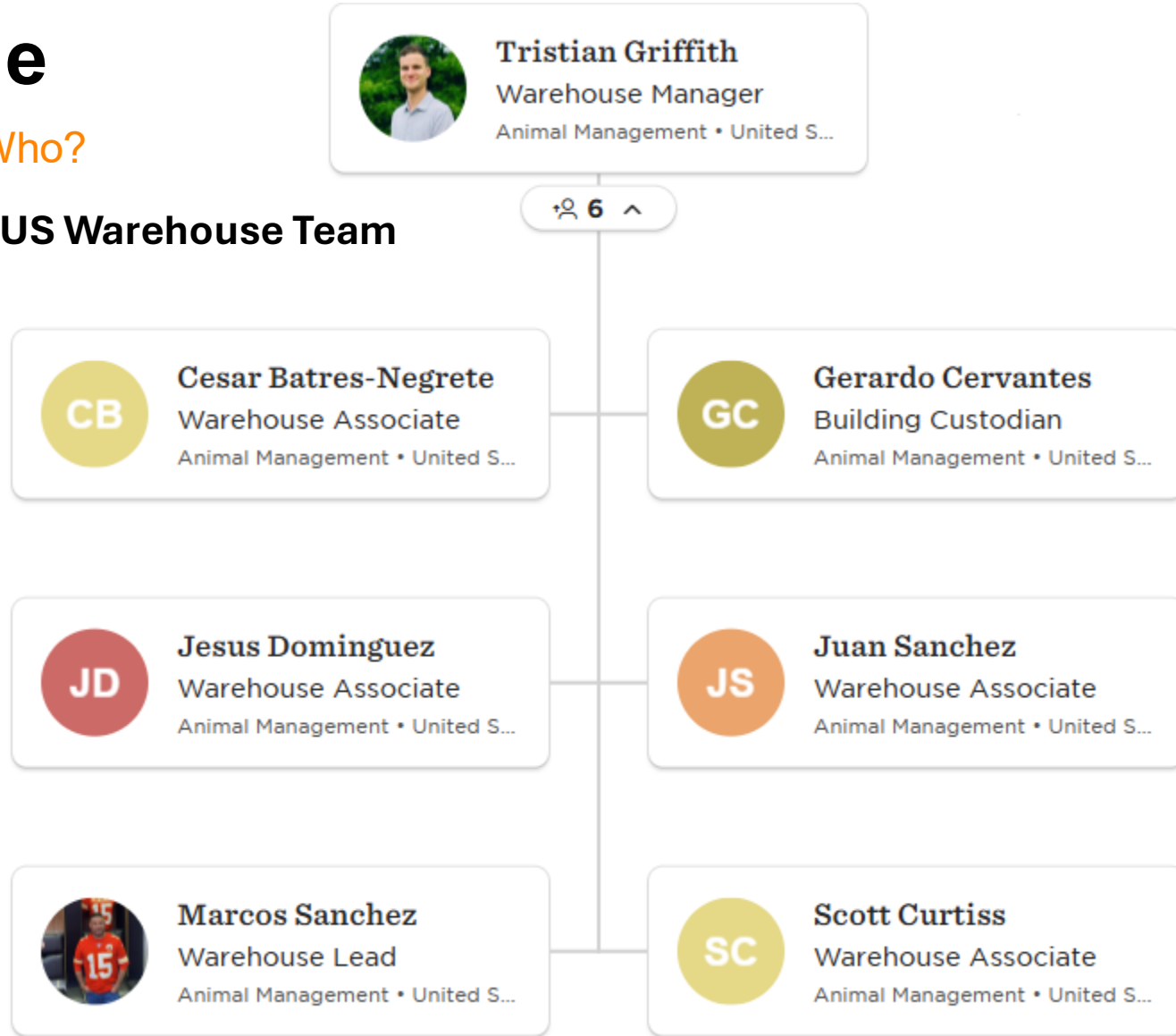
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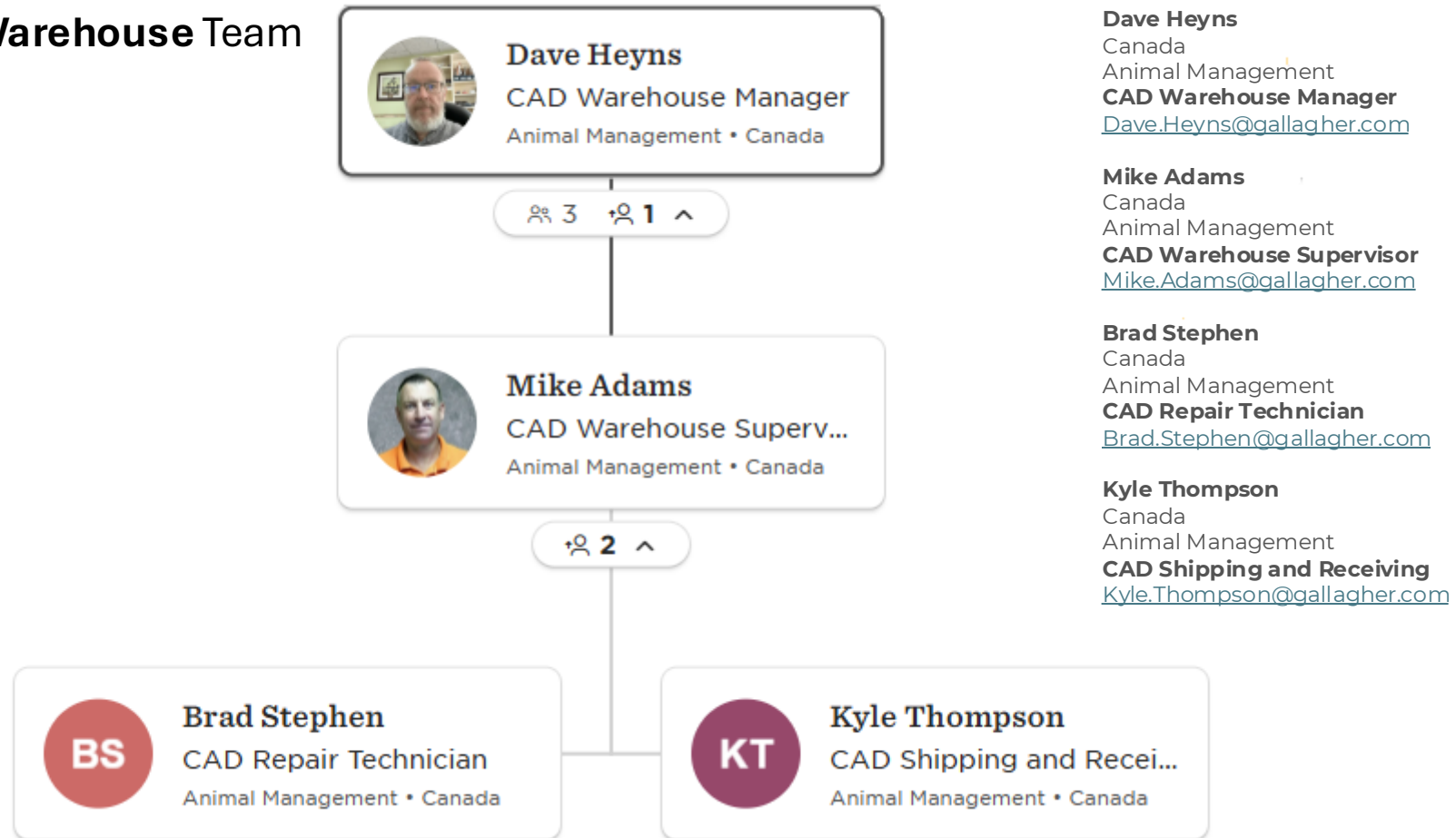
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[gerardo.cervantes@gallagher.com](mailto:gerardo.cervantes@gallagher.com)

**Cesar Batres-Negrete**  
 United States of America  
 Animal Management  
 Warehouse Associate  
[cesar.negrete@gallagher.com](mailto:cesar.negrete@gallagher.com)

# People

## WHO's Who?

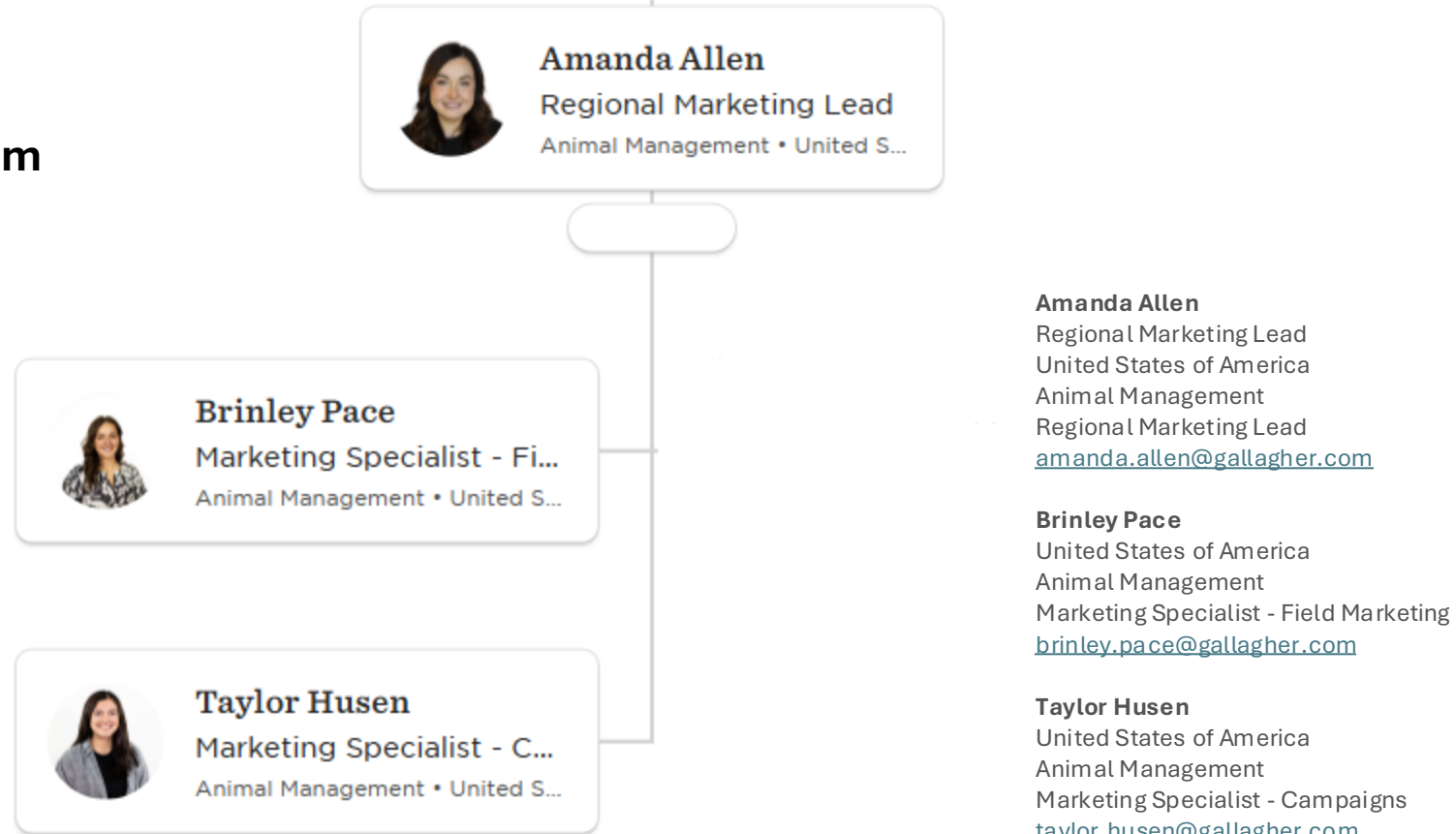
Meet the **Canada Warehouse Team**



# People

## WHO's Who?

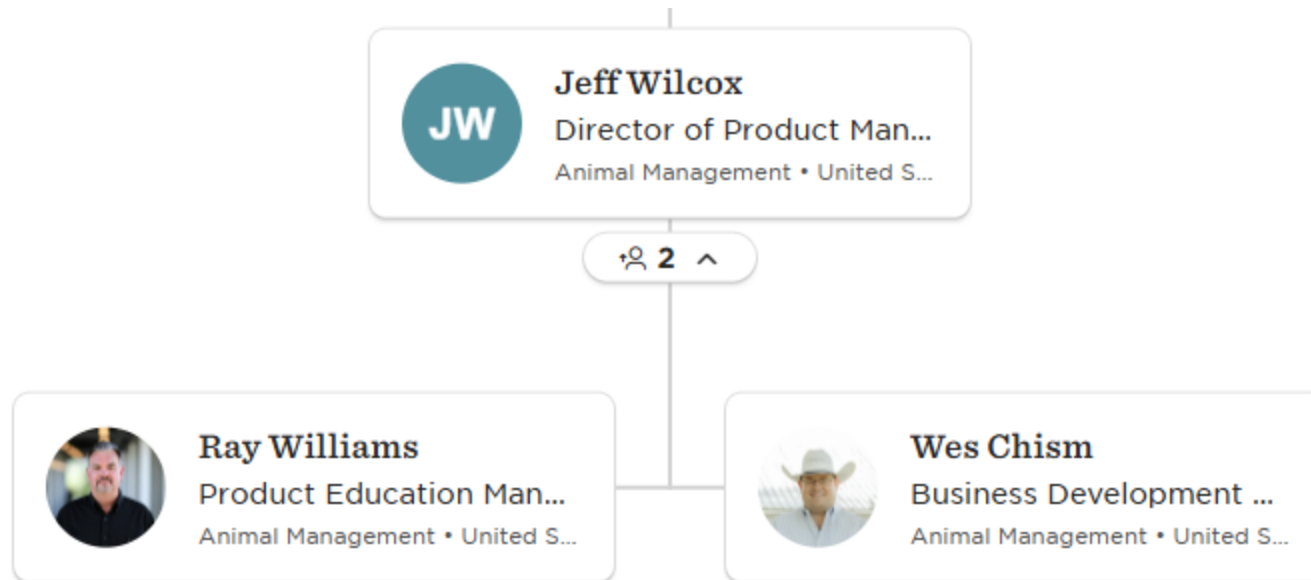
### Meet the Marketing Team



# People

## WHO's Who?

### Meet the Product Development Team



**Jeff Wilcox**  
United States of America  
Animal Management  
**Director of Product Management**  
[jeff.wilcox@gallagher.com](mailto:jeff.wilcox@gallagher.com)

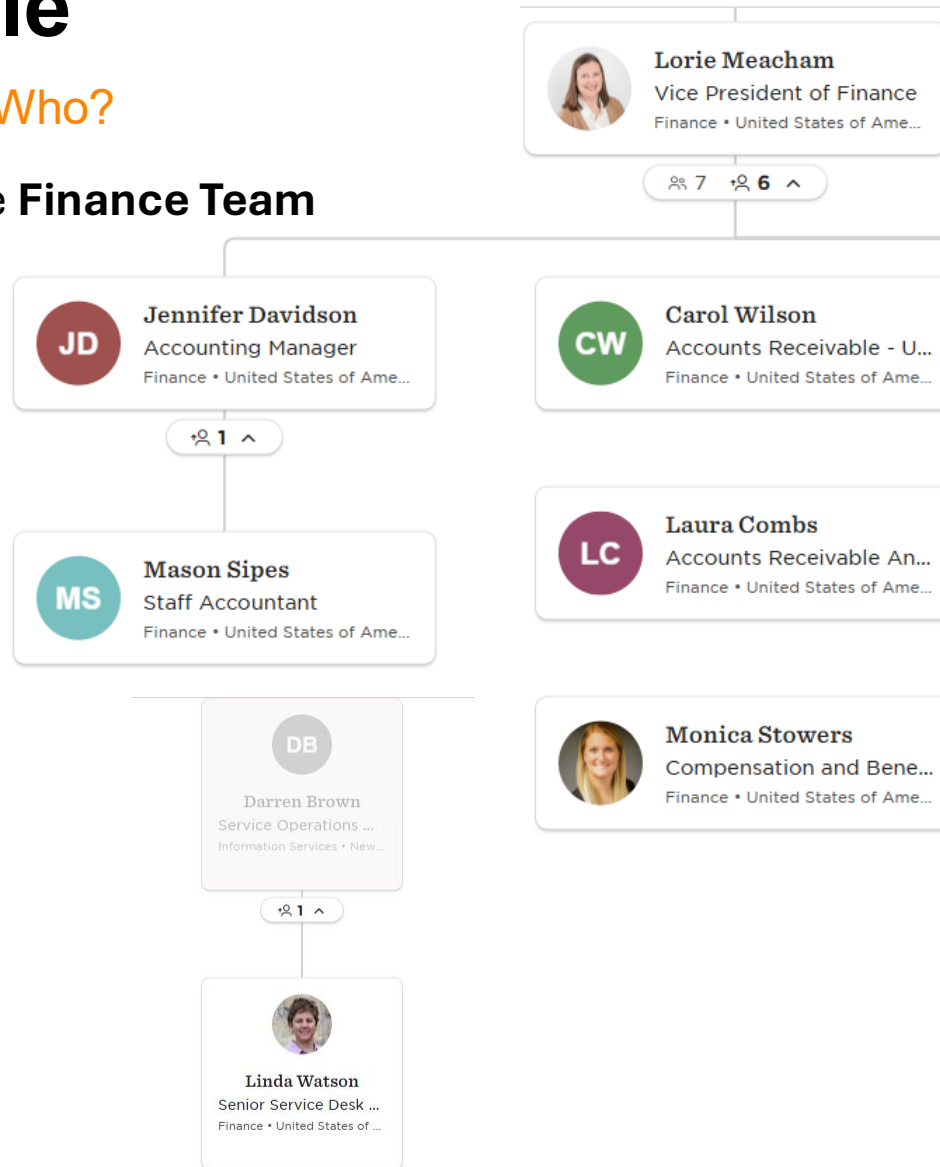
**Wes Chism**  
United States of America  
Animal Management  
**Business Development Manager - Animal Performance**  
[wes.chism@gallagher.com](mailto:wes.chism@gallagher.com)

**Ray Williams**  
United States of America  
Animal Management  
**Product Education Manager**  
[ray.williams@gallagher.com](mailto:ray.williams@gallagher.com)

# People

## WHO's Who?

### Meet the Finance Team



**Lorie Meacham**  
United States of America  
Finance  
**Vice President of Finance**  
[lorie.meacham@gallagher.com](mailto:lorie.meacham@gallagher.com)

**Carol Wilson**  
United States of America  
Finance  
**Accounts Receivable - United States**  
[carol.wilson@gallagher.com](mailto:carol.wilson@gallagher.com)

**Linda Watson**  
United States of America  
Finance  
**Senior Service Desk Technician**  
[Linda.watson@gallagher.com](mailto:Linda.watson@gallagher.com)

**Dennis Murphy**  
United States of America  
Finance  
**Accounts Payable/Receivable**  
[dennis.murphy@gallagher.com](mailto:dennis.murphy@gallagher.com)

**Jennifer Davidson**  
United States of America  
Finance  
**Accounting Manager**  
[jennifer.davidson@gallagher.com](mailto:jennifer.davidson@gallagher.com)

**Mason Sipes**  
United States of America  
Finance  
**Staff Accountant**  
[mason.sipes@gallagher.com](mailto:mason.sipes@gallagher.com)

**Lori Erickson**  
United States of America  
Finance  
**Accounts Payable and Administrative Specialist**  
[lori.erickson@gallagher.com](mailto:lori.erickson@gallagher.com)

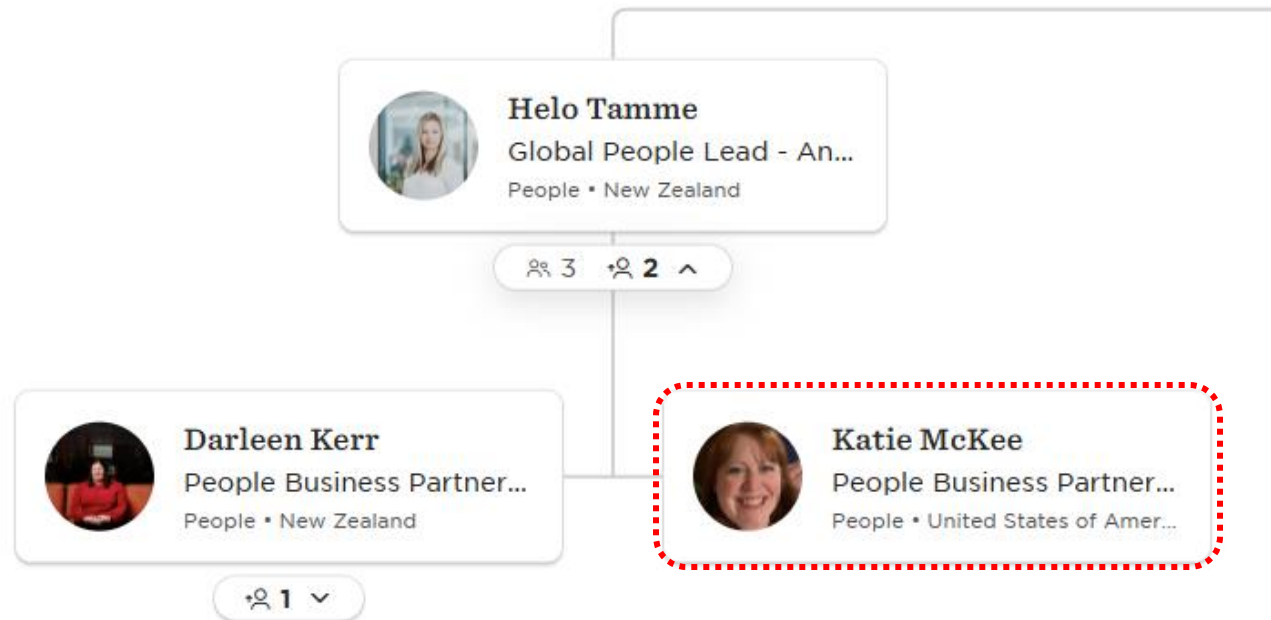
**Monica Stowers**  
United States of America  
Finance  
**Compensation and Benefits Partner / Payroll / Fleet Vehicles**  
[monica.stowers@gallagher.com](mailto:monica.stowers@gallagher.com)

**Laura Combs**  
United States of America  
Finance  
**Accounts Receivable Analyst / Key Accounts**  
[laura.combs@gallagher.com](mailto:laura.combs@gallagher.com)

# People

## WHO's Who?

### Meet your **People Business Partner**



**Katie McKee - North America People Business Partner  
– Animal Management**

Contact Katie for questions related to your role, policies, procedures, development goals, etc.

[Katie.mckee@gallagher.com](mailto:Katie.mckee@gallagher.com)

# Policies, Policies

All North American Policies can be found on Connect > Find It > Policy

While there are many company policies, the ones listed below are the most critical for you as a Territory Manager and will be referenced most often in your role:

## Company Vehicle Policy

- Hold a current and valid driver licence
- Stay up to date on vehicle maintenance
- Ensure your vehicle has a toolkit and a car emergency kit
- Report all incidents, near-misses, or vehicle damage to your manager within 24 hours
- Annual Motor Vehicle Checks are conducted on an annual basis
- **Fuel Card** – use regular unleaded gasoline when refuelling your vehicle, *only associated when using your Fleet Vehicle.*
  - Fuel Cards **may not be used** for **Rental Vehicles**.
  - All personal equipment purchased by Gallagher must be registered with the company, Tables, chairs, tools, storage bins etc..
  - These items must be returned in the vehicle in the event leaving the company.
  - Any electronics such as TV, Monitors and printers must be approved by your ASM's.
  - Serial numbers must be provided as these items are depreciated over time and tie to a different GL accounting code.

## Expenses

- Use the company credit card for business-related travel, meals, hotels
- All receipts must be submitted into SAP Concur monthly
- Mid-range accommodations are to be used for overnight stays
- Meals should be within reasonable limits and not include more than two alcoholic beverages

## On the Job Injuries

- All employees are insured by Worker's Compensation Insurance
- Any injuries sustained in the normal course of work should be reported immediately to your manager and recorded in the Assure portal

## Monica Stowers

United States of America  
Finance

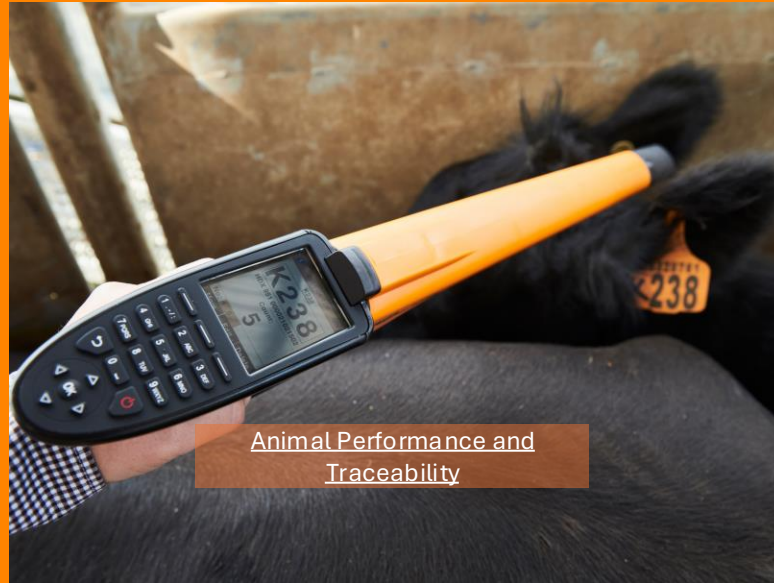
Compensation and Benefits Partner / Payroll / Fleet Vehicles

[monica.stowers@gallagher.com](mailto:monica.stowers@gallagher.com)

# Products and Innovation



Animal Fencing



Animal Performance and Traceability



Animal Handling



Land and Water Care



eShepherd



Insight Hub

Section 02

# Training & Development

Learning resources, growth paths, and safety

# Training and Growth

At Gallagher, learning never stops.

You own your growth, but you'll always be supported by your leaders and our learning tools:

[Litmos Training and Development](#) – training paths & product learning

[Knowbe4](#) – privacy, phishing, and AI learning

[Learning Hub](#)– your go-to for essentials like confidentiality, health & safety, SAP, and more

Every experience here is a chance to build skills, achieve success, and grow your career.



# Health and Safety

## Hazard Identification



Hazard			
A hazard is <i>something</i> that has the potential to cause harm to people, property or the environment			
Examples:			
Dust	Heavy box	Damaged cord	Bench too low
Sharp edge	Tripping hazard	Poor lighting	Unsecured load
Blocked exit	Hot surface	Poor ventilation	Faulty plug
Unstable shelf	Stock in aisles	Area too hot	Overloaded rack

Near Miss
A Near Miss is an <i>event</i> that could have resulted in harm but didn't. Near Miss is a type of an incident
Examples:
Worker almost cuts hand on an exposed blade.
Item falls from height but doesn't hit anyone.
Forklift almost hits a pedestrian.
Electrical cord sparks but doesn't cause an injury or fire.
Moving machine part almost catches a worker's finger or clothing.
Unsecured load on a pallet nearly tips over.
Lifting a heavy jig nearly strains employee's back.
Unprotected hot surface was touched and almost caused a burn.

\*\*\* Both hazards and Near Misses should be reported into Assure \*\*\*

## Electric Fencing Safety Awareness

Safety
Safety

Here are some safety considerations to follow when installing electric fencing:

**General safety**

Don't touch fences with your head or mouth. People with pacemakers or other heart problems also should consult their doctors before working with or near electric fences. Always use caution.

**Energy installation**

Only connect one energizer to a fence.

**Can electric fences cause fires?**

There is a misconception that dry vegetation touching an electric fence can cause fires - this is extremely unlikely. In order to cause a fire, vegetation needs to be dry and green so, therefore the vegetation will not ignite. Once vegetation dries out it becomes non-conductive meaning any short-circuited fence.

The only conceivable but still very unlikely scenario where an electric fence could start a fire where wire shorts to a grounded metal object, such as a steel post or wire where a seasonal fence border, in the presence of abundant dry vegetation. This scenario is very unlikely to occur in practice, and even less so on a well-maintained fence.

Producers with fences on steel posts or those using ground wires in the fence are advised to ensure the live wires are well insulated and the fence is clear of vegetation. If these factors are of concern then on days of severe or above-free rain, consider turning the energizer off.

Groundrods for energizers should be at least 60 feet utility grounding rods.

**Electric fence construction**

Avoid running fences parallel to power lines, and try to install fences so that they cross power lines at right angles. If you can't avoid parallel electric fence and power lines, offset the fences at least 30 feet from the power lines, and make sure the top-fence wires are no more than six feet high.

Do not attach fence wires to utility poles.

Electric fences bordering public thoroughfares are required to have a warning sign at least every 250 feet where the public has access to electric fences, such as along roads.

**Check with your local authority for specific regulations.**

Landowners are responsible for preventing public interference with their own fences. Therefore, try to avoid installing electric fences under overhead wires, and minimize the distance that electric fence wires run parallel to overhead telephone cables. This particularly applies if the electric fence wire is carrying high current, such as a hot-but-wire-to-large-fencing-system. (See Telephone Interference pg 49)

Never use barbed wire for electric fence wire because people or animals could more easily become entangled in it.

**Radio interference**

Keep electric fences as far away from radio antennas as possible. Gallagher energizers comply with local, Telecom and International standards and safety regulations. However, problems can arise for a number of reasons, and can be difficult to eliminate in areas with poor radio reception.

To avoid radio interference:

- The energizer ground must be highly conductive.
- The energizer must be well away from any electrical power supply.
- The energizer should be well away from any water pipes.

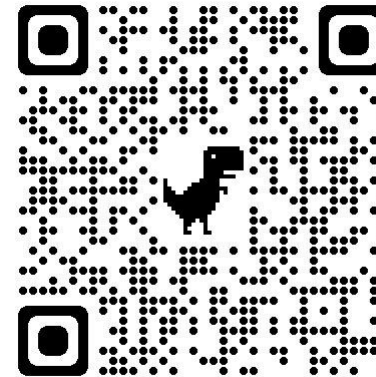
Do not allow an energizer ground wire to touch a building which can act as a broadcast aerial. Use greater insulation to insulate the ground wire. Ground the offending radio and improve its aerial. Try to have both as far away from the energizer and fence lines as possible.

All types of wire may break and recoil when stretched. Always use hand and eye protection when handling hi-tensile wire.

[Page 44 Electric Fencing Safety Awareness](#)

## Assure

[Assure Portal & System Training](#)



- Why reporting hazards & incidents is important
  - Types of reports
  - How to complete an incident and hazard report well
- EVERYONE should be able to use the Assure Portal

Section 03

# TM How-To Guides

Building orders, dealer procedures, and warranties

# TM How to's:

## Building Orders:

- Dealer orders:
  - Pull up latest Dealer order form on your computer

**2026 Order Form**

Store Name: \_\_\_\_\_  
 Customer #: \_\_\_\_\_  
 Town: \_\_\_\_\_  
 Ordered by: \_\_\_\_\_  
 P.O. #: \_\_\_\_\_  
 Date: \_\_\_\_\_  
 Notes: \_\_\_\_\_

Order Total: \$ 0

**Instructions:**  
 1) You only need to fill in the Qty column.  
 2) The total value of your order is shown at the top. (Freight Free on orders over \$2000)  
 3) When you've filled out the Order Form, save it with a different name (maybe today's date, or your purchase order #).

- Fill out top with Customer information (customer number = External ID)
  - If you were not given a PO number utilize customer name or Initials and date code. EX Montana Feed bin ordered June 5. MTF060526
  - Add any special information in the notes. EX: promo codes, special pricing, shipping information etc.)
  - If Drop shipping to an address not on file add to the bottom of the order form with contact information.
- Once order is complete filter on the QTY column to only items on order

**2025 Order Form**

Store Name: American Grazinglands  
 Customer #: 72038  
 Town: Mackay, ID  
 Ordered by: Galen  
 P.O. #: 19987-1GR  
 Date: 4/4/2025  
 Notes: Please ship to end user. Free freight. Drop ship fee applies please price 62089 at 100.00 each

Order Total: \$ 1,178.00


**Instructions:**  
 1) You only need to fill in the Qty column.  
 2) The total value of your order is shown at the top. (Freight Free on orders over \$2000)  
 3) When you've filled out the Order Form, save it with a different name (maybe today's date, or your purchase order #).

DESCRIPTION	PRODUCT NUMBER	QUANTIT	UNIT	LESS THAN CASE	DEALER COST	TOTAL	CASE SIZ	RETAIL
Ring Top Post 33"	072315	50	EA	Cases Only	\$4.00	\$ 200.00	50	\$5.99
2624 Turbo Wire White (2 mm/3/32")	062089	6	EA		\$107.00	\$ 642.00	6	\$152.99
Turbo Brad 1312 + 328' (7/64")	062148	4	EA		\$84.00	\$ 336.00	4	\$119.99
Please ship to:								
Shoat Roath								
230 Skull Valley Road								
Skull Valley, UT.								
1-435-640-1419								

# TM How to's:

## Building Orders:

- Fill out top with Customer information (customer number = External ID)
  - If you were not given a PO number utilize customer name or Initials and date code. EX Montana Feed bin ordered June 5. MTF060526
  - Add any special information in the notes. EX: promo codes, special pricing, shipping information etc.)
  - If Drop shipping to an address not on file add to the bottom of the order form with contact information.
- Once order is complete filter on the QTY column to only items on order



### 2025 Order Form

Store Name: **American Grazinglands**  
 Customer #: **72038**  
 Town: **Mackay, ID**  
 Ordered by: **Galen**  
 P.O. #: **19987-1GR**  
 Date: **4/4/2025**

Notes: **Please ship to end user. Free freight. Drop ship fee applies please price 62089 at 100.00 each**

Order Total: \$ **1,178.00**

Instructions:  
 1) You only need to fill in the Qty column.  
 2) The total value of your order is shown at the top. (Freight Free on orders over \$2000)  
 3) When you've filled out the Order Form, save it with a different name (maybe today's date, or your purchase order #).

Top Products  
 New Product  
 While Supplies Last  
 Can't Break Case

DESCRIPTION	PRODUCT NUMBER	QUANTIT	UNIT	LESS THAN CASE	DEALER COST	TOTAL	CASE SIZ	RETAIL
Ring Top Post 33"	G72315	50	EA	Cases Only	\$4.00	\$ 200.00	60	\$5.99
2624' Turbo Wire White (2 mm/3/32")	G62089	6	EA		\$107.00	\$ 642.00	6	\$152.99
Turbo Braid 1312' + 328' (7/64")	G62148	4	EA		\$84.00	\$ 336.00	4	\$119.99
Please ship to:								
Shoat Roath								
230 Skull Valley Road								
Skull Valley, UT.								
1-435-640-1419								

- Save to file you have created
- Email to Customer service
  - [Am.customerservice.NA@gallagher.com](mailto:Am.customerservice.NA@gallagher.com)
  - Add any notes that are on the order form to the email, and any pertinent information.
  - Subject line of email should be Dealer name and external ID order
    - EX: American Grazinglands #72038 Shoat order

# TM How to's:

## Building Orders:

### •Branch accounts

- New stores added to current dealer accounts or satellite locations
- Fill out Branch form or have the dealer fill it out and send to patty.



CUSTOMER INFORMATION SHEET  
BUYING GROUP/BRANCH ACCOUNT

TRADE NAME: \_\_\_\_\_ PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

SHIPPING ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_ PROVINCE/POSTAL CODE: \_\_\_\_\_

BILLING ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_ PROVINCE/POSTAL CODE: \_\_\_\_\_

NAME OF INDIVIDUAL TO CONTACT: \_\_\_\_\_ TITLE: \_\_\_\_\_

STORE NUMBER: \_\_\_\_\_ EMAIL ADDR: \_\_\_\_\_

BRANCH ( ) SUBSIDIARY ( ) BUYING GROUP ( ) OF: \_\_\_\_\_

IS A PURCHASE ORDER NO. REQUIRED? \_\_\_\_\_ CREDIT LINE DESIRED: \$ \_\_\_\_\_

F.O.B. POINT: Dealer is responsible for freight which will be paid by Gallagher Power Fencing Systems and then added to invoice.

### •End User and Specialty Accounts:

- End Users, Ranches, Government Agencies, Universities, Non-Profits.

If a customer does not shop with one of our current dealers or is unhappy with the current Service, there and they are going to purchase a lot, we can set them up with an account direct.

- Credit card on file
- Billing with terms
- Payment up front with CC or ACH withdrawal.
  - ACH withdrawal will require information from Carol Wilson.

Work with Supervisor to determine pricing for customer.

- Wholesale
- Retail
- Discount on retail.

# TM How to's:

## NEW Dealer Procedures:

### New Dealer Paperwork:

- \*\*\*Before sending in new dealer paperwork the stores need to be Built in CRM\*\*\*
- Fill out highlighted portions of Resale agreement yellow portions only and **send to Patty Silvius.**
  - Make sure all contact information is in the email to her, and who will be filling out the Docusign paperwork. She will then send all paperwork to be filled out by the dealer.

**Purchase Agreement**



**Schedule**

Gallagher	Name: Gallagher North America Inc ("Gallagher", "us", "we", "our")
Customer	<b>Full Official Name:</b> _____ a [corporation/limited liability company/limited partnership/etc. organized and existing under the laws of _____] <b>Incorporation Number:</b> _____
Addresses for Notices	<b>Gallagher:</b> Address: 5005 NW 41 <sup>st</sup> Street Riverside MO 64150 Phone: 800-531-5908 <b>Customer Name:</b> _____ <i>First and last name of the person who will be signing the agreement.</i> <b>Address:</b> _____ <b>Phone:</b> _____ <b>Email:</b> _____

- Do not give out pricing to Prospect dealers till a credit check has been done and they have been approved for buying.
  - After credit approval we can send suggested order with pricing.
- Dealers can be set up as Credit Card only if they don't want to have an account with terms. They would be pay ahead customers, or we can save a Credit card on file. It is best to try to get them into an account if possible since we get a 3% change when we run Credit cards.
- \*\*\*New owners taking over old dealers need to fill out a new resale agreement. When sending in added information make sure to Inform the office that this a new credit application for an old dealer and make sure to add the Dealer Externa ID so we can keep sales history attached to the New Account.

## [Flow Chart on How to Setup a New Account](#)

Click on the link above

# TM How to's:

## Customer Warranties & repairs:

- Warranty and repairs varies from Products.
- **Energizers:**
  - 3-year warranty for defect only (lithium batteries now included in the 3 years)
  - Over the counter exchange
    - M10-M160
    - S6-S30
  - Needing sent in for repair
    - M360 and up
    - S30 and up
- To be covered under warranty we will need the sales receipt for the purchase of the product and if needing repair will need to fill out the repair form and send it with the item

**Repair Form**  
Please return this form with product to:  
Gallagher North America  
Attn: Repairs  
5005 NW 41st Street  
Riverside, MO 64150  
Have Questions?  
800-631-6908 Repairs #3

I am a Dealer  End User

Dealer # if applicable:   
Dealer Name if applicable:   
Contact Name:   
Address:   
City, State, Zip:   
Phone No:   
Fax No:   
Email:

- Customer will have to cover shipping back. (unless you feel we should this will be situational).
- **30 Day Guarantee** - Gallagher has a 30-day satisfaction guarantee, from date of purchase. If a customer returns the unit to the dealer or us within that time frame, we will issue credit.
- Need copy of Purchase receipt with dating
- Need a reason why or defect issue
- If dealer is asking for credit they have 60 days from date of purchase to get it back to Gallagher with copy of the purchase receipt.

*Dealer/ Customer will need to contact TM or CS and request an RA# to send back with Item. Once received the credit will be issued.*

If you have any enquiries about our Warranty and/or how to make a claim, please contact us. You can find our contact details for your region on our website: <https://am.gallagher.com/en/International-Distributors>.

### Technical Support (All Identified Roles)

- **Kaylee Craven** — Technical Support Manager / [kaylee.craven@gallagher.com](mailto:kaylee.craven@gallagher.com)
- **James Purcell** — Technical Support Representative / [james.purcell@gallagher.com](mailto:james.purcell@gallagher.com)
- **Jake Larson** — Technical Support Representative / [jake.larson@gallagher.com](mailto:jake.larson@gallagher.com)
- **Jada Ramsey**- Technical Support Representative -(scales and AP&T) [jada.ramsey@gallagher.com](mailto:jada.ramsey@gallagher.com)

Section 04

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# Tools & Reporting

Power BI, policies, expenses, marketing, and quick links

# Power BI

## How Power BI reporting benefits a Territory Manager (TM) and how you can use it

Power BI gives Territory Managers a clear, real-time view of what's happening in their region.

No more guesswork or outdated spreadsheets just instant insights into sales trends, stock levels, product performance, and customer behaviour.

With everything in one place, decision-making becomes simple and data-driven.

TMs can walk into any store knowing:

- Which products to focus on
- Where gaps exist on shelf
- Which customers need follow-up
- How their territory is tracking against targets

It also makes conversations with dealers and key accounts more professional and evidence-based.

[Power BI Report](#) , covering Gross Margin, Daily Reports, etc...

The result: stronger execution, sharper focus, and smarter, faster decisions that drive sales and customer satisfaction.

## How a TM can use Power BI

- **Daily snapshot:** Quickly check overall territory performance, top opportunities, and any areas slipping behind target.
- **Store planning:** Use product and store-level dashboards before each visit to determine what to focus on gaps, promotions, stock issues, or upsell opportunities.
- **Customer conversations:** Bring evidence into meetings (e.g., sales trends, category gaps, competitor movement) to create stronger, data-backed discussions.
- **Retail execution:** Identify stores not executing to plan such as low on-shelf availability or poor promotional compliance and prioritize them.
- **Product focus:** Look at product-level performance to know which SKUs to push, protect, grow, or troubleshoot.
- **Trend spotting:** Recognize emerging patterns early (e.g., rising demand, declining ranges, seasonal shifts) and adjust strategy quickly.
- **Efficient follow-ups:** Use customer-level insights to stay on top of calls, orders, and follow-ups, improving service and sales outcomes.
- **Performance tracking:** Monitor progress against targets weekly or monthly to stay accountable and adjust the plan in real time.

# POWER BI HOW TO USE:

Access through favorites link in web extension (edge or chrome), teams home page, Share point. Create reports for all sales, and customer information.

## Sales and Product Information (AM NA Sales)

- Year over year sales
- 5 years sales comparison
- Products sales
- Territory account information
- Budget information.

## Orders - NA Daily order report

Open Orders (product that hasn't invoiced and shipped yet)

Monthly Cumulative orders ( orders submitted throughout the month)

NA Sales Playbook



# EXPENSE REPORTING:

The screenshot shows the SAP Concur 'Manage Expenses' page for a 'New York Trip' totaling \$557.25. It features a list of expenses with columns for Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested amount. Alerts include 'Itemsizations are required for this entry' and 'You must attach a receipt image to this expense'. A table below lists items like Hotel, Taxi, and Individual Lunch with their respective vendors and dates.

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
!	+	Pending Card Transaction	Hotel	Oredam Hotel New York, New York	07/08/2018	\$328.54
	+	AMEX 14321	Taxi	Speedy Cab	07/07/2018	\$18.79
!	+	Cash/Other	Individual Lunch	Café Anavenetro Cantina New York, New York	07/07/2018	\$16.24
				The Bistro New York, New York	07/07/2018	\$164.08
				Breech Lounge	07/06/2018	\$12.13

## NEW –Expense Details and Receipt in One View

### Before

Old experience required clicking back and forth between the Expense detail screen and the Receipt Image to know what amounts to enter in each field.

## NA Sales Playbook

The screenshot shows the 'New York Trip' page with a detailed view of an expense. It includes an 'Exceptions' table, an 'Expenses' table, and a 'Receipt Image' section with fields for Expense Type, Transaction Date, Business Purpose, Vendor Name, City, Payment Type, Amount, and PEA Project ID. The total amount and requested amount are both \$978.67.

Expense Type	Date	Amount	Exception
Business Meal	07/07/2018	\$164.08	Transactions must have receipts attached
Hotel	07/08/2018	\$328.54	This document only has sub-entries with one or more exceptions
Parking/Transit	07/08/2018	\$27.96	This report contains the Parking/Transit Program (Canada Employees Only) expense type. This expense type may only be used by employees located in Canada. Please use a different

Expenses	Date	Expense Type	Amount	Requested
<input checked="" type="checkbox"/>	07/08/2018	Hotel Oredam Hotel, New York, New Y	\$749.96	\$749.96
<input checked="" type="checkbox"/>	07/07/2018	Business Meals - Meetings The Bistro, New York, New York	\$164.08	\$164.08
<input checked="" type="checkbox"/>	07/07/2018	Individual Lunch Café Anavenetro Cantina, New Y	\$16.24	\$16.24
<input checked="" type="checkbox"/>	07/06/2018	Individual Lunch Breech Lounge, New York, New	\$12.13	\$12.13
<input checked="" type="checkbox"/>	07/06/2018	Taxi Shuttle Train Speedy Cab, New York, New York	\$18.79	\$18.79
<input checked="" type="checkbox"/>	07/08/2018	Individual Dinner Gress And Trestle, Seattle, Wash	\$17.47	\$17.47

TOTAL AMOUNT: \$978.67      TOTAL REQUESTED: \$978.67

### After

New experience has clean lines that focus the user on the tasks needed to submit the report:

- Add expenses
- Add receipts
- Remove alerts

# Marketing

## The GNA Marketing Team:

- **Amanda Allen**, Marketing Lead for North America
- **Taylor Husen**, Campaign Marketing Specialist (website, advertising, social media)
- **Brinley Pace**, Field Marketing Specialist (retail, events, collateral)

## Links to Bookmark:

### US (inventoried collateral):

Use the [USKC Marketing Materials Order Form](#)

### Canada (inventoried collateral and swag):

Use the [CAN OS Marketing Materials Order Form](#)

Locally printed items (infographics and sell sheets):

### Available for download in Bynder under:

- [NA English](#)
- [NA French](#)
  - Note: Our Intern, Madison is currently working on refreshing all the sheets in these collections and making sure that they are all versions available and up to date on price.

Catalogs and Fencing 101 Guides have arrived to USKC Warehouse in the Promo Room. If your team needs these, please place an order via the **Wrike link** below.

All other marketing requests (including business cards and new sell sheet development):

Submit through the [Wrike Request Form](#)

We've also created a [Marketing Collateral Guide](#), which brings everything together in one place. The guide includes visuals, product codes, and interactive links to help ensure you're selecting and ordering the correct items through the appropriate platforms.

### Additional updates:

#### Clothing orders (US & CAN):

Orders have been placed and will be shipped directly to your home addresses. As these are bulk orders, delivery will take some time, but all items are expected to arrive by July 10.

#### US swag order:

Currently in progress. We'll continue to share updates as it moves forward. Planned items include rubberized gloves, hats, koozies, and knit hats.

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<https://media.gallagher.com/l/23d7d6f413dd6817/>

Click the link above to access GNA Marketing Guide

# Quick Links

## Your digital toolbox

Here are the key platforms and resources you'll use at Gallagher. Take your time exploring them

- [HiBob – People Information](#) - Our HR system. Update your details, check organisation charts, celebrate birthdays, recognise colleagues, and see what's happening across Gallagher.
- [ADP](#) - View your payslips, apply for leave, and manage direct deposit and tax withholdings
- [IS Service Portal](#) - Your go-to for IT help — log issues, make requests, and explore support resources.
- [Learning Hub](#) - Access e-learning modules. Some are mandatory, others are optional to help you grow in your role.
- [Employee Assistance Programme \(EAP\)](#)
- [Melon](#) – Travel hub for reserving hotels and booking hotels and flights.
- [IS self-service and request portal](#) – this is where you raise any IS issues you might have.
- [Learner's Toolkit](#) – this is where you access e-learnings. You will already have some that you are required to do, but there are lots of others that might help give you a step up in your new role.
- [Policy](#) – This is where you have access to all policies that apply to the US team. Make sure you go through these and understand them.
- [Animal Management Hub](#) – Everything Animal Management lives here.
- [Connect \(Intranet\)](#) - Stay up to date with Gallagher news, policies, and resources. Great for exploring Animal Management updates and company stories.
- [Performance Growth Cycle](#) - Tools to support your development conversations, feedback, and goal setting.
- [Health & Safety Information](#) - Access resources to help you stay safe at work.
- [Expense](#) - Submit and track your expenses quickly and easily.

Section 05

# Territory Planning

Network, prospecting, CRM, and weekly planning

# Your Network

You are never on this journey alone

## Internally

You're part of a team that works as one. Collaboration is key to how we deliver exceptional results and customer experiences.

### Your Core Support Team Includes:

- **Marketing** – helping drive demand, lead generation, and brand engagement.
- **Customer Services** – ensuring every customer query is handled quickly and professionally.
- **Technical Services** – providing expert product and system support.
- **Repairs** – ensuring customer equipment stays reliable and operational.
- **Key Account Manager** – supporting major customer relationships and strategic opportunities.

### Your Buddy: *[Insert name]*

Your buddy will be your go-to person during your first few months — someone to help you navigate Gallagher systems, answer questions, and connect you with the right people.

### Cross-Functional Teams

You'll also collaborate daily with colleagues across operations, logistics, marketing campaigns, and digital engagement to deliver outstanding value to our customers.

## Externally

As part of your role, you'll build strong relationships across **<TERRITORY>** agricultural and rural retail network. These partnerships are vital to our shared success.

### Our Key External Partners include:

**<NEED TO ENTER DATA>**

Each of these partners plays a crucial role in representing the Gallagher brand and helping customers access our market-leading solutions.

# Planning for success

**Territory planning is the foundation of consistent sales performance and market growth.**

Planning for success ensures every salesperson is clear on where to focus their time, which customers and products matter most, and how to balance prospecting, developing, protecting, and servicing our customer base.

A well-structured Territory Plan turns strategy into action. It drives smarter decision-making, improves call quality, reduces wasted effort, and keeps the team aligned around the highest-value opportunities.

Most importantly, it creates ownership and accountability. A territory is no longer just a map. It becomes a strategic, growth-focused business unit, managed with intent, insight, and discipline.



# Weekly Networking & Prospecting Rhythm...

**Purpose:** Channel expansion and diversify, \$\$\$\$

## 1. Prepare

- Allocate some weekly time to networking and prospecting
- Clarify your networking and prospecting goals for the week.
- Identify key contacts: existing clients, referral partners, and potential new prospects.

## 2. Maintain Existing Relationships

- Check in with current contacts and clients.
- Add value with insights, resources, or engagement.
- Stay visible on LinkedIn and in relevant industry channels.

## 3. Build New Connections

- Identify new contacts that could lead to opportunities.
- Send personalised connection messages or introductions.
- Explore relevant groups, events, or communities to expand your reach.

## 4. Prospecting

- Research and qualify potential leads.
- Reach out with targeted messages or calls.
- Track responses and schedule follow-ups or discovery conversations.

## 5. Deepen Relationships

- Arrange conversations, coffee chats, or check-ins with both network and prospects.
- Offer introductions, resources, or advice to build trust.
- Keep notes of key insights and next steps.

# CRM

## CRM Business Expectations & Guidelines

### 1. Purpose of CRM

Our CRM system is a critical business tool designed to improve customer visibility, support proactive account management, enhance forecasting accuracy, and enable better strategic decisions. Its effectiveness depends on consistent, high-quality use from every team member.

### 2. Core Expectations

#### Daily Use:

All team members must use the CRM every working day to keep information current and reliable.

#### Timely Updates:

All visit notes, opportunities, tasks, and follow-ups must be entered within 24 hours.

#### Accuracy:

Information must be factual, concise, and actionable.

#### Consistency:

Use shared naming conventions for activities, opportunities, and accounts to maintain clarity across the national team.

### 3. Visit Notes Requirements

Every customer visit entry must include:

- Purpose of the visit
- Key discussion points
- Agreed actions with due dates
- Opportunities identified
- Risks, issues, or anything needing escalation

Notes should be professional, objective, and easy for anyone in the business to understand.

### 4. Opportunity Management

#### Pipeline Hygiene:

- All opportunities must have accurate stages, realistic close dates, and correct values.
- No stale or outdated opportunities should remain in the system.

#### Progress Updates:

- Update the stage immediately when customer movement occurs.
- Add notes summarising progress and next steps.

### 5. Task & Follow-Up Management

- All customer commitments must be entered as tasks with deadlines.
- Tasks should be clear, actionable, and tied to customer outcomes.
- Complete and close tasks promptly once done.

# CRM

## 6. Reporting Requirements

The CRM is the source of truth for:

- Weekly and monthly reporting
- Forecasting
- Territory planning
- Leadership visibility

Before weekly reviews, all data must be up to date to ensure accurate reporting and decision-making.

## 7. Accountability

CRM usage will be reviewed during:

- 1:1 coaching
- Performance conversations
- Territory reviews
- Quarterly planning & forecasting

Consistent under-use or poor-quality data will be treated as a performance gap.

## 8. Continuous Improvement

Team members are encouraged to provide feedback on CRM processes. Suggestions for improvements, efficiencies, or enhancements are welcomed.

## 9. Professional Standards

All CRM entries must:

- Be written professionally
- Align with our values (honesty, integrity, excellence)
- Avoid slang, jokes, or personal commentary
- Represent the business appropriately at all times

## 10. Summary

Our CRM is a strategic business tool. When used consistently and correctly, it strengthens customer relationships, improves execution, enhances visibility, and drives growth. Every team member is responsible for maintaining high standards of CRM usage.

# Weekly activation plan

## Example

Ops follow up includes follow up of opportunities on file, new quotes etc.

Admin includes emails, quotes, batching phone calls that you have not returned during the day etc.

Once a month - Strategic planning session.

	Mon	Tues	Wed	Thurs	Fri
8am					
9am	Monday Sales Meeting	Store calls	Store calls	Store calls	Training
10am	4 Weekly Calendar	Store calls	Store calls	Store calls	Training
11am	Lock in coming week	Store calls	Store calls	Store calls	Store calls
12pm					
1pm	Op's Follow up	Store calls	Store calls	Store calls	Store calls
2pm	Op's Follow up	Store calls	Store calls	Store calls	Store calls
3pm	Planning	Farm calls/store calls	Farm calls/store calls	Farm calls/store calls	Finalise the week/Admin
4pm	Planning	Admin	Admin	Admin	Finalise the week/Admin
5pm	Admin	Admin	Admin	Admin	

Section 06

# Onboarding

Your 30-60-90-day plan, team channels, and territory maps

# 30-60-90 Day Plan

## FIRST 30 DAYS

**Primary Focus:** Compliance, learning, understanding the territory, and establishing strong habits.

### Role & Business Understanding

#### Measurable Indicators:

- TM can verbally explain their role, territory purpose, and how success is measured
- TM can identify their manager, support teams, and escalation paths
- Completion of required policy acknowledgements

### CRM & Planning Expectations

#### Measurable Indicators:

- CRM login established and used weekly
- Minimum activity logging occurring consistently (dealer + end user)
- Accounts and contacts entered accurately for all dealers
- Calendar populated at least 2 weeks forward

The goal of the first 90 days is to build confidence, capability, and accountability while ensuring the Territory Manager understands expectations around CRM, planning, profitability, dealer relationships, and execution.

# 30-60-90 Day Plan

FIRST 30 DAYS

## Territory & Customer Knowledge

### Measurable Indicators:

- TM can identify top 5–10 priority dealers in territory
- TM can explain key end-user segments and buying drivers
- TM can summarize historical territory performance at a high level

## Product & Training

### Measurable Indicators:

- 100% completion of Security, HR, and CRM training
- Completion of assigned core Gallagher Learning modules
- TM can identify where to find pricing, product, and technical support

## Manager Expectations by Day 30

### Success Looks Like:

- TM demonstrates learning mindset and engagement
- CRM usage is consistent and accurate
- TM understands expectations for the next phase

# 30-60-90 Day Plan

## FIRST 60 DAYS

### FIRST 60 DAYS

**Primary Focus:** Field execution, relationship building, and disciplined planning.

#### Field & Relationship Execution

##### Measurable Indicators:

- Regular dealer and end-user calls conducted independently
- Documented follow-ups completed after customer interactions
- Positive early feedback or engagement from dealers

#### CRM, Planning & Accountability

##### Measurable Indicators:

- CRM activities logged within expected timeframes
- Active opportunities entered and updated
- Calendar maintained 3–4 weeks forward
- Participation in pipeline or CRM review discussions

# 30-60-90 Day Plan

FIRST 60 DAYS

## Territory & Sales Management

### Measurable Indicators:

- Draft territory plan created and reviewed with manager
- TM can articulate top opportunities and risks
- Efficient routing and travel decisions demonstrated

## Profitability & Business Discipline

### Measurable Indicators:

- Demonstrates understanding of pricing guidelines
- Discounts reviewed and aligned with expectations
- TM can explain how margin impacts business and bonuses

## Manager Expectations by Day 60

### Success Looks Like:

- TM operates independently in the field
- CRM reflects real-world activity
- TM communicates clearly about wins, challenges, and priorities

# 30-60-90 Day Plan

## FIRST 90 DAYS

### FIRST 90 DAYS

**Primary Focus:** Ownership of territory performance and long-term success.

#### Ownership and Execution

##### Measurable Indicators:

- TM proactively plans and executes territory activity
- Growth opportunities identified and pursued
- Dealer relationships show increasing depth and trust

#### CRM & Performance Management

##### Measurable Indicators:

- CRM data is accurate, timely, and complete
- Pipeline reflects realistic opportunities
- CRM used for planning, not just reporting

# 30-60-90 Day Plan

## Business Insight & Profitability

### Measurable Indicators:

- Pricing and deal decisions align with profitability goals
- TM can discuss margin, mix, and growth drivers
- Sound judgment demonstrated in customer negotiations

## Communication & Professionalism

### Measurable Indicators:

- Clear, professional communication with internal teams
- Adherence to processes for orders, service, and escalation
- Professional representation of Gallagher in the field

## Manager Expectations by Day 90

### Success Looks Like:

- TM demonstrates ownership and accountability
- Strong, repeatable CRM habits are established
- TM is positioned to contribute meaningfully to sales goals
- TM is aligned with Gallagher culture and expectations

# 30-60-90 Day Plan

## Ongoing Expectations

### Measurable Indicators:

- Consistent CRM usage and forward planning
- Sustained dealer and customer engagement
- Accountability to territory plans and expectations
- Ongoing learning and skill development

# Teams Channels

## Exploring our team's channel

You'll be invited to join AM Team channels

Insert appropriate Teams channels here



**Thank you and Welcome to Gallagher!**

