



# TORO Analysis of Marketing Managers to Sales Agents, Financial Services

## INPUT SECTION:

Transfer	Title	O*NET	Filters		
From Title:	Marketing Managers	11-2021.00	Abilities:	Importance Level: 50	Weight: 1
To Title:	Sales Agents, Financial Services	41-3031.02	Skills:	Importance Level: 69	Weight: 1
Labor Market Area:	Maine Statewide		Knowledge:	Importance Level: 69	Weight: 1

## OUTPUT SECTION:

Grand TORQ:		92
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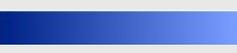
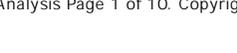
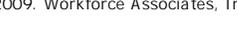
Ability TORQ		Skills TORQ		Knowledge TORQ	
Level	 89	Level	 95	Level	 92

Gaps To Narrow if Possible				Upgrade These Skills				Knowledge to Add			
Ability	Level	Gap	Impt	Skill	Level	Gap	Impt	Knowledge	Level	Gap	Impt
Speech Clarity	60	14	75	No Skills Upgrade Required!				Economics and Accounting	53	12	78
Speech Recognition	57	4	75					Mathematics	60	7	77

LEVEL and IMPT (IMPORTANCE) refer to the Target Sales Agents, Financial Services. GAP refers to level difference between Marketing Managers and Sales Agents, Financial Services.

## ASK ANALYSIS

Ability Level Comparison - Abilities with importance scores over 50

Description	Marketing Managers	Sales Agents, Financial Services	Importance
Oral Expression	66 	62 	78 
Oral Comprehension	67 	57 	75 
Speech Recognition	53 	57 	75 
Speech Clarity	46 	60 	75 
Written Comprehension	64 	53 	68 
Problem Sensitivity	64 	51 	68 
Deductive Reasoning	71 	60 	68 
Written Expression	64 	57 	65 
Near Vision	60 	53 	65 



Originality	62	50	62
Inductive Reasoning	64	50	62
Fluency of Ideas	67	53	59
Information Ordering	55	48	59
Category Flexibility	55	42	56
Selective Attention	37	35	50

## Skill Level Comparison - Abilities with importance scores over 69

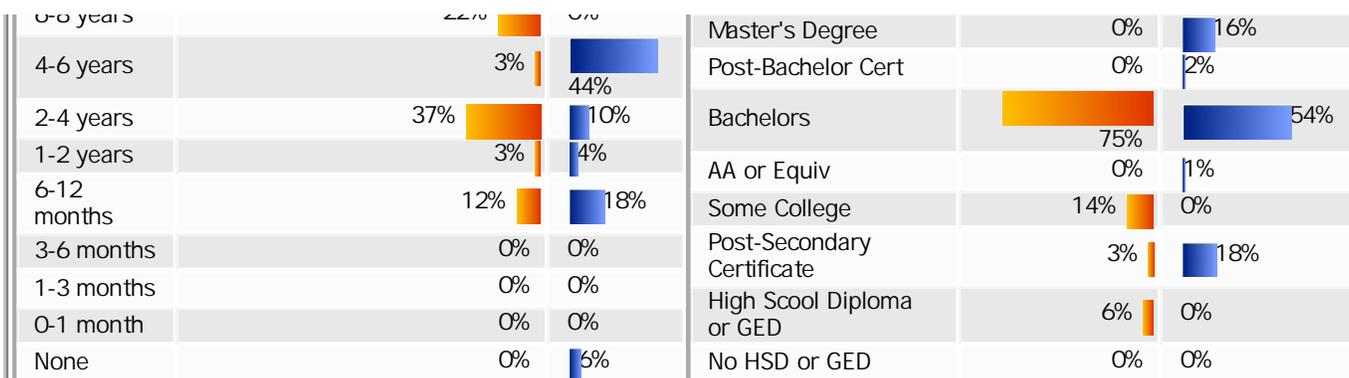
Description	Marketing Managers	Sales Agents, Financial Services	Importance
Active Listening	79	66	89
Reading Comprehension	84	65	78
Speaking	79	66	78
Time Management	77	60	77
Service Orientation	70	65	76
Judgment and Decision Making	78	62	72
Critical Thinking	80	64	71
Monitoring	81	66	71
Persuasion	75	66	71

## Knowledge Level Comparison - Knowledge with importance scores over 69

Description	Marketing Managers	Sales Agents, Financial Services	Importance
Customer and Personal Service	83	71	86
Sales and Marketing	85	67	84
English Language	67	50	80
Economics and Accounting	41	53	78
Mathematics	53	60	77

## Experience &amp; Education Comparison

Related Work Experience Comparison			Required Education Level Comparison		
Description	Marketing Managers	Sales Agents, Financial Services	Description	Marketing Managers	Sales Agents, Financial Services
10+ years	6%	3%	Doctoral	0%	0%
8-10 years	13%	6%	Professional Degree	0%	4%
			Post-Masters Cert	0%	0%



## Marketing Managers

## Sales Agents, Financial Services

## Most Common Educational/Training Requirement:

Bachelor's or higher degree, plus work experience

Bachelor's degree

## Job Zone Comparison

4 - Job Zone Four: Considerable Preparation Needed

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A minimum of two to four years of work-related skill, knowledge, or experience is needed for these occupations. For example, an accountant must complete four years of college and work for several years in accounting to be considered qualified.

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Employees in these occupations usually need several years of work-related experience, on-the-job training, and/or vocational training.

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## Tasks

## Marketing Managers

## Core Tasks

## Generalized Work Activities:

- Communicating with Persons Outside Organization - Communicating with people outside the organization, representing the organization to customers, the public, government, and other external sources. This information can be exchanged in person, in writing, or by telephone or e-mail.
- Communicating with Supervisors, Peers, or Subordinates - Providing information to supervisors, co-workers, and subordinates by telephone, in written form, e-mail, or in person.
- Making Decisions and Solving Problems - Analyzing information and evaluating results to choose the best solution and solve problems.
- Establishing and Maintaining Interpersonal Relationships - Developing constructive and cooperative working relationships with others, and maintaining them over time.
- Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information.

## Sales Agents, Financial Services

## Core Tasks

## Generalized Work Activities:

- Selling or Influencing Others - Convincing others to buy merchandise/goods or to otherwise change their minds or actions.
- Making Decisions and Solving Problems - Analyzing information and evaluating results to choose the best solution and solve problems.
- Establishing and Maintaining Interpersonal Relationships - Developing constructive and cooperative working relationships with others, and maintaining them over time.
- Getting Information - Observing, receiving, and otherwise obtaining information from all relevant sources.
- Communicating with Persons Outside Organization - Communicating with people outside the organization, representing the organization to customers, the public, government, and other external sources. This information can be exchanged in person, in writing, or by telephone or e-mail.
- Interacting With Computers - Using computers and computer systems (including hardware and software) to program, write software, set up functions, enter data, or process information.



### Specific Tasks

#### Occupation Specific Tasks:

- Advise business and other groups on local, national, and international factors affecting the buying and selling of products and services.
- Compile lists describing product or service offerings.
- Conduct economic and commercial surveys to identify potential markets for products and services.
- Confer with legal staff to resolve problems, such as copyright infringement and royalty sharing with outside producers and distributors.
- Consult with buying personnel to gain advice regarding the types of products or services expected to be in demand.
- Consult with product development personnel on product specifications such as design, color, and packaging.
- Coordinate and participate in promotional activities and trade shows, working with developers, advertisers, and production managers, to market products and services.
- Develop pricing strategies, balancing firm objectives and customer satisfaction.
- Direct the hiring, training, and performance evaluations of marketing and sales staff and oversee their daily activities.
- Evaluate the financial aspects of product development, such as budgets, expenditures, research and development appropriations, and return-on-investment and profit-loss projections.
- Formulate, direct and coordinate marketing activities and policies to promote products and services, working with advertising and promotion managers.
- Identify, develop, and evaluate marketing strategy, based on knowledge of establishment objectives, market characteristics, and cost and markup factors.
- Initiate market research studies and analyze their findings.
- Negotiate contracts with vendors and distributors to manage product distribution, establishing distribution networks and developing distribution strategies.
- Select products and accessories to be displayed at trade or special production shows.
- Use sales forecasting and strategic planning to ensure the sale and profitability of products, lines, or services, analyzing business developments and monitoring market trends.

information, enter data, or process information.

### Specific Tasks

#### Occupation Specific Tasks:

- Contact prospective customers in order to present information and explain available services.
- Determine customers' financial services needs, and prepare proposals to sell services that address these needs.
- Develop prospects from current commercial customers, referral leads, and sales and trade meetings.
- Evaluate costs and revenue of agreements in order to determine continued profitability.
- Make presentations on financial services to groups in order to attract new clients.
- Prepare forms or agreements to complete sales.
- Review business trends in order to advise customers regarding expected fluctuations.
- Sell services and equipment, such as trusts, investments, and check processing services.

### Detailed Tasks

#### Detailed Work Activities:

- access media advertising services
- advise clients on financial matters
- advise clients or customers
- complete information on loan forms
- conduct sales presentations
- ensure correct grammar, punctuation, or spelling
- evaluate degree of financial risk
- evaluate product quality for sales activities
- fill out business or government forms
- follow contract, property, or insurance laws
- interview customers
- maintain records, reports, or files
- maintain telephone logs
- make decisions
- make presentations on financial matters
- motivate people
- obtain information from individuals
- prepare reports
- provide customer service
- sell products or services
- sell securities services
- use computers to enter, access or retrieve data
- use interpersonal communication techniques



## Detailed Tasks

## Detailed Work Activities:

- analyze market or delivery systems
- analyze sales activities or trends
- assign work to staff or employees
- conduct market research
- conduct or attend staff meetings
- conduct research on work-related topics
- conduct sales presentations
- confer with other departmental heads to coordinate activities
- consult with managerial or supervisory personnel
- develop marketing strategy
- develop pricing strategy
- direct and coordinate activities of workers or staff
- estimate product demand
- evaluate performance of employees or contract personnel
- hire, discharge, transfer, or promote workers
- identify potential markets
- make presentations
- manage contracts
- monitor consumer or marketing trends
- oversee execution of organizational or program policies
- oversee sales programs
- perform general financial analysis
- prepare reports
- provide customer service
- use knowledge of economic trends
- use knowledge of written communication in sales work
- use marketing techniques
- use product knowledge to market goods
- use public speaking techniques

## Technology - Examples

## Analytical or scientific software

- ClickTracks software
- Minitab software
- Nedstat Sitestat
- Online advertising reporting software

## Customer relationship management CRM software

- QAD Marketing Automation
- Sage Software SalesLogix

- use knowledge of economic trends
- use knowledge of written communication in sales work
- use marketing techniques
- use public speaking techniques
- use sales techniques

## Technology - Examples

## Calendar and scheduling software

- Scheduling software

## Data base user interface and query software

- Data entry software
- Database management software
- FileMaker Pro software
- Microsoft Access
- Web-based information systems

## Electronic mail software

- Email software
- IBM Lotus Notes
- Microsoft Outlook

## Financial analysis software

- Bloomberg Professional
- Financial needs analysis software
- Realm Business Solutions INSIGHT for ARGUS
- Sales analysis software

## Internet browser software

- Web browser software

## Office suite software

- Microsoft Office

## Presentation software

- Microsoft PowerPoint

## Project management software

- Project management software

## Spreadsheet software

- Microsoft Excel
- Spreadsheet software

## Word processing software

- Microsoft Word
- Word processing software



- Siebel Server Sync

#### Data base reporting software

- Database software (reporting feature)

#### Data base user interface and query software

- AdSense Tracker

- ClearEDGE software

- Database software (user interface and query feature)

- Databox software

- Fast Track Systems software

- Microsoft Access

- Structured query language SQL

#### Desktop publishing software

- Microsoft Publisher

#### Electronic mail software

- Email software

- Listserv software

- Microsoft Outlook

#### Enterprise resource planning ERP software

- SAP software

#### Graphics or photo imaging software

- Graphic presentation software

#### Internet browser software

- Web browser software

#### Presentation software

- Microsoft PowerPoint

#### Project management software

- Atlas OnePoint GO TOAST

- Microsoft Project

#### Spreadsheet software

- Microsoft Excel

#### Transaction server software

- Armand Morin MultiTrack Generator

#### Word processing software

- Microsoft Word

#### Tools - Examples

- Desktop computers

#### Tools - Examples

- 10-key calculators

- Desktop computers

- Notebook computers

- Personal computers



- Notebook computers
- Personal computers
- Personal digital assistants PDA
- Scanners
- Tablet computers

### Labor Market Comparison

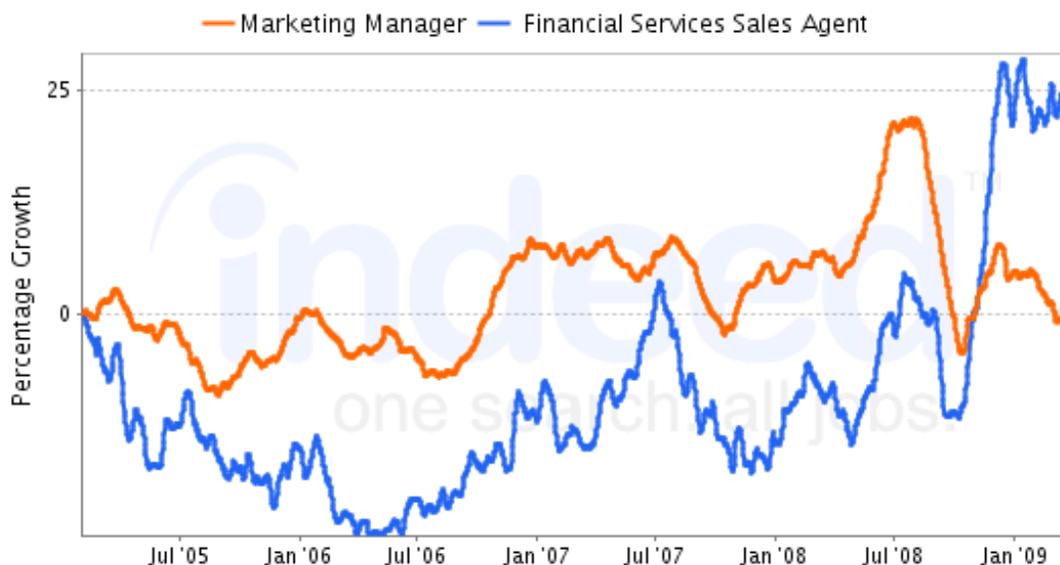
Description	Marketing Managers	Sales Agents, Financial Services	Difference
Median Wage	\$ 74,560	\$ 65,230	\$( 9,330)
10th Percentile Wage	\$ 47,060	\$ 35,780	\$( 11,280)
25th Percentile Wage	N/A	N/A	N/A
75th Percentile Wage	\$100,100	\$103,750	\$ 3,650
90th Percentile Wage	\$134,210	N/A	N/A
Mean Wage	\$ 83,370	\$ 79,360	\$( 4,010)
Total Employment - 2007	570	N/A	N/A
Employment Base - 2006	600	1,054	454
Projected Employment - 2016	644	1,109	465
Projected Job Growth - 2006-2016	7.3 %	5.2 %	-2.1 %
Projected Annual Openings - 2006-2016	17	33	16

### National Job Posting Trends

Trend for Marketing Managers

Trend for  
Sales  
Agents,  
Financial  
Services

### Job Trends from Indeed.com



Data from [Indeed](http://Indeed.com)

### Recommended Programs

#### Financial Planning

Financial Planning and Services. A program that prepares individuals to plan and manage the financial interests and growth of individuals and institutions. Includes instruction in portfolio management, investment management, estate planning, insurance, tax planning, strategic investing and planning, financial consulting services, and client relations.

Institution	Address	City	URL
University of Maine at Augusta	46 University Dr	Augusta	<a href="http://www.uma.maine.edu/">www.uma.maine.edu/</a>
University of Maine at Augusta	46 University Dr	Augusta	<a href="http://www.uma.maine.edu/">www.uma.maine.edu/</a>

#### Investments and Securities

Investments and Securities. A program that prepares individuals to manage assets placed in capital markets, and related technical operations. Includes instruction in security analysis, debt and equity analysis, investment strategies, securities markets, computer-assisted research, portfolio management, portfolio performance analysis, and applications to specific investment problems and business situations.

No schools available for the program

#### Business and Personal/Financial Services Marketing Operations

Business and Personal/Financial Services Marketing Operations. A program that prepares individuals to perform marketing and operational tasks associated with the provision of personal and financial services. Includes instruction in banking, marketing research, advertising, promotional campaign organization, insurance, media relations, and applicable technical and administrative skills

No schools available for the program

### Maine Statewide Promotion Opportunities for Marketing Managers

O*NET Code	Title	Grand TORQ	Job Zone	Employment	Median Wage	Difference	Growth	Annual Job Openings
11-2021.00	Marketing Managers	100	4	570	\$74,560.00	\$0.00	7%	17



13-2052.00	Personal Financial Advisors	91	3	360	\$94,100.00	\$19,540.00	10%	13
11-1021.00	General and Operations Managers	85	4	8,490	\$77,050.00	\$2,490.00	-5%	209
23-1011.00	Lawyers	85	5	1,910	\$80,120.00	\$5,560.00	6%	73
11-1011.00	Chief Executives	82	5	750	\$102,290.00	\$27,730.00	-6%	25
23-1023.00	Judges, Magistrate Judges, and Magistrates	82	5	80	\$115,160.00	\$40,600.00	1%	2
29-1051.00	Pharmacists	78	5	1,190	\$112,550.00	\$37,990.00	22%	46
11-3021.00	Computer and Information Systems Managers	77	5	870	\$83,130.00	\$8,570.00	8%	21
11-9121.00	Natural Sciences Managers	77	5	180	\$79,810.00	\$5,250.00	8%	5
29-1062.00	Family and General Practitioners	75	5	710	\$138,550.00	\$63,990.00	7%	20
29-1063.00	Internists, General	75	5	420	\$144,760.00	\$70,200.00	6%	12
29-1081.00	Podiatrists	74	5	40	\$101,210.00	\$26,650.00	5%	6
25-1051.00	Atmospheric, Earth, Marine, and Space Sciences Teachers, Postsecondary	73	5	100	\$77,390.00	\$2,830.00	11%	3
11-9041.00	Engineering Managers	72	5	720	\$91,030.00	\$16,470.00	-2%	14
29-1041.00	Optometrists	72	5	90	\$107,740.00	\$33,180.00	19%	4

### Top Industries for Sales Agents, Financial Services

Industry	NAICS	% in Industry	Employment	Projected Employment	% Change
Securities and commodity contracts, brokerages, and exchanges	5231-2	44.53%	142,466	191,181	34.19%
Self-employed workers, primary job	000601	16.35%	52,317	55,737	6.54%
Other financial investment activities	523900	7.50%	24,003	33,826	40.93%
Other nondepository credit intermediation, including real estate credit and consumer lending	522290	4.53%	14,503	17,393	19.92%
Activities related to credit intermediation	522300	1.99%	6,367	8,244	29.48%
Management of companies and enterprises	551100	1.66%	5,296	6,105	15.28%
Self-employed workers, secondary job	000602	1.35%	4,308	4,288	-0.45%



Other investment pools and funds	525900	0.56%	1,783	2,503	40.41%
Direct insurance (except life, health, and medical) carriers	524120	0.30%	965	1,008	4.52%
Management, scientific, and technical consulting services	541600	0.27%	848	1,514	78.52%
Wholesale electronic markets and agents and brokers	425100	0.24%	764	867	13.48%
Employment services	561300	0.14%	437	553	26.56%
Insurance and employee benefit funds	525100	0.13%	405	499	23.23%
Electric power generation, transmission and distribution	221100	0.11%	347	319	-8.03%
Automobile dealers	441100	0.09%	275	312	13.44%

### Top Industries for Marketing Managers

Industry	NAICS	% in Industry	Employment	Projected Employment	% Change
Management of companies and enterprises	551100	11.87%	19,882	22,919	15.28%
Computer systems design and related services	541500	4.78%	8,005	10,808	35.02%
Depository credit intermediation	522100	3.25%	5,441	5,548	1.95%
Management, scientific, and technical consulting services	541600	3.24%	5,431	9,695	78.52%
Self-employed workers, primary job	000601	2.33%	3,908	4,164	6.54%
Securities and commodity contracts, brokerages, and exchanges	5231-2	2.25%	3,760	5,545	47.46%
Software publishers	511200	2.15%	3,596	4,630	28.76%
Advertising and related services	541800	2.05%	3,430	3,870	12.83%
Computer and peripheral equipment manufacturing	334100	1.95%	3,274	2,143	-34.54%
Semiconductor and other electronic component manufacturing	334400	1.88%	3,150	2,753	-12.59%
Navigational, measuring, electromedical, and control instruments manufacturing	334500	1.72%	2,874	2,752	-4.26%
Office administrative services	561100	1.63%	2,722	3,451	26.79%
Wholesale electronic markets and agents and brokers	425100	1.52%	2,542	2,884	13.48%
Professional and commercial equipment and supplies merchant wholesalers	423400	1.48%	2,475	2,885	16.57%
Research and development in the physical, engineering, and life sciences	541710	1.41%	2,357	2,515	6.69%