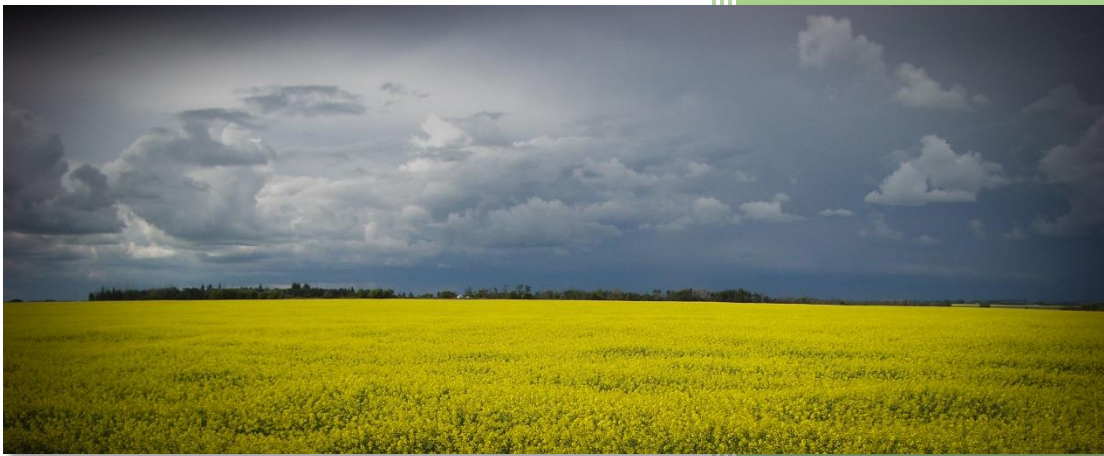


2021

Agricultural Marketing and Sales Practice Standard



**ALBERTA INSTITUTE
OF AGROLOGISTS**

Approved by AIA Council

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Preface

This practice standard is part of the continuing effort by the Alberta Institute of Agrologists (AIA) to meet its obligations under the *Agrology Profession Act*. The *Act* specifies that the Institute must establish, maintain and enforce standards of practice as part of the profession's role in protecting the public in matters related to agrology.

This document was created by a Practice Area Expert Committee (PAEC) consisting of five regulated members of the AIA. Members were selected for their expertise and long-standing practice in agricultural marketing and sales.

This practice standard forms the basis upon which practice reviews will be conducted by the AIA to assist members in ensuring that their professional practice meets a standard that outlines the knowledge, work experience, skills and performance required for professionals practicing in agricultural marketing and sales.

This document will be reviewed on a periodic basis to ensure it is up-to-date with current industry standards and state of knowledge for the practice area.

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1. Introduction

This practice standard applies to regulated members of the Alberta Institute of Agrologists (AIA) who practice or intend to practice in the "*Agricultural Marketing and Sales*" practice area (PA). It defines expectations and outlines requirements regarding professional practice within the PA. Documentation of these requirements provides necessary assurance to the public that the Agrology profession has identified the requirements for competent practice and members have a standard upon which to assess their professional practice and identify potential learning needs in their continuing competence program.

This practice standard forms the basis for implementation of a practice review protocol for this PA. Members working within this PA will be able to request a review of their professional practice based on this practice standard. Such a review will provide valuable input for areas of improvement.

1.1 Objectives

The objectives of this practice standard include the following:

- Identify and define the knowledge requirements (education, experience, skill sets) and performance requirements for professional practice within the PA;
- Provide documentation of the requirements indicated above so that regulated members of AIA may assess their knowledge against this standard and thereby identify learning needs to ensure they meet the standard;
- Provide a standard against which a member's professional practice may be reviewed by a peer review committee to assist them in identifying areas that may need improvement;
- Provide a mechanism whereby AIA can demonstrate that the profession is managed in a manner that protects the interests of the public in matters related to agricultural marketing and sales work conducted by regulated members of the AIA.

1.2 Definitions

Competence: The ability to perform certain tasks in one's professional practice based on educational training, skills, and work experience in a manner that meets performance objectives as defined in a practice standard.

Core Knowledge Area: A general area of knowledge consisting of one or more specialized subject matter areas that are required for practice within a PA, for example: "Soils", "Vegetation", "Water", etc.

Performance: The exercise of knowledge in one's professional practice that demonstrates the required ethical conduct and wise judgment as specified within a practice standard.

Practice Area: A unique functional area of professional practice within the agrology profession that requires specialized knowledge, based on education, work experience, and skill sets.

Practice Area Expert Committee: A committee of experts who have demonstrated through their professional practice that they have a comprehensive understanding of the requirements for professional practice in a PA.

Practice Review: A process whereby a peer review panel examines a regulated member's professional practice against a practice standard with the intent of providing input on practice improvement.

Practice Standard: A document that outlines the requirements and expectations for professional practice within a PA.

Professional Practice: The competent and ethical provision of specialized knowledge, recommendations and assessments based on one's educational training, work experience, and skill sets while being accountable to one's peers as a regulated member of a professional regulatory organization.

Public: Those who utilize the services and rely upon the recommendations of Professional Agrologists (P.Ag) or Registered Technologists in Agrology (RTAg).

Regulated Member: A member in good standing with the Alberta Institute of Agrologists who holds one of the following designations: P.Ag, RTAg, A.I.T, or A.T.T.

Skill: An ability that has been developed over multiple years of work experience in one's professional practice.

Subject Matter Area: A specialized area of knowledge required for professional practice within a PA, for example: "Soil Chemistry", "Plant Physiology", "Introductory Hydrology", etc.

Experience: Knowledge or practical wisdom gained from what one has observed, encountered, or undergone.

2. Scope of the Practice Area

Agrologists who practice within the *Agricultural Marketing and Sales PA (AM&S)* are professionals with specialized education, knowledge, skills, and work experience that provide advice and service related to agricultural inputs for the production of food and related products. These professionals work within a wide and highly specialized network to deliver products and services which is marketed to the agri-food sector. These products provide value to producers (e.g. farmers, ranchers, horticulturalists, agroforesters, etc.) and society in the form of increased production and enhanced food quality while meeting environmental standards. AM&S Agrologists may also provide services such as marketing of crops and livestock, thereby enhancing producers' farm margin/profitability.

Agrologists in the *AM&S PA* work closely with consulting Agrologists and producers to determine the best products, (e.g., crop and livestock input products, equipment, and technology) that support the goals of the enterprise. These people provide up-to-date relevant information to the producer on the benefits of their product line(s) to enhance the profitability of agricultural operations. Agrologists working within the *AM&S PA* are an intermediary between the company selling the product and the farm, they must know the working details of the product, features and benefits of the product, as well as the company's marketing plan in order to support the product for distributors and manufacturers of the inputs. The *AM&S* practitioner working with producers on marketing crops and livestock must be aware of changing market conditions, prices, delivery options to provide the client with timely relevant information.

Marketing and sales representatives develop a close relationship with producers. This is accomplished through the flow of product information between the producer and the sales representative. Communication and discussion around the present agricultural situation, other competing products trends and issues combined with the past experience of the product is critical to the success of each party. Market intelligence is gained from many sources to deliver quality and credible information to the producer and back to the company. This information is critical to agricultural supply companies as it outlines the potential sales and prospects for the products being sold.

The professionals practicing within the *AM&S PA* do work within a varied, complex and diverse set of circumstances throughout the year. First, they must be familiar with and understand the current state of the agricultural sector and second integrate their product with the objectives of

the producer. The AM&S Agrologists work closely with a consulting Agrologist with expertise in the Crop Production, Livestock Production, and/or Rangeland and Pasture Management PAs to determine how best to meet the producer's needs given their current operational situation.

These individuals must have both technical and interpersonal skills to work within a wide cross section of participants in the industry at many scales, from large holdings to small farmers, researchers, scientists, government regulators, extension specialists, marketing specialists, managers, supervisors and the general public. The person working in this PA must be a strong communicator with highly developed oral, written and analytical skills.

2.1 Core Activities Within the PA

Seven core activities have been identified in the *Agricultural Marketing and Sales* PA. They are: Product Knowledge; Communications to Users; Understanding Research and Development Outcomes; Managing the Marketing-Sales Continuum; Market Research; Finance, Planning and Budgeting; and Exposure to the Agricultural Industry. These core activities outline the work of an Agrologist providing service and sales of agriculture inputs used by producers.

2.1.1 Product Knowledge

Product knowledge is specific to the sector the Agrologist is working in. The Agricultural Marketing and Sales PA includes input products for crop and livestock production, crop and livestock equipment and machinery, and technologies for precision land management. The Agrologist representing a product and/or equipment line to producers must have comprehensive understanding of a product's role in the individual's farming system. This understanding includes such factors as the products features and benefits, specific operating conditions, capacity, limitations, safety and environmental risks, as well as regulated use of the material being sold, and benefits and limitations of new technologies.

2.1.2 Communication to Users

A key component of the sales process includes communication of product benefits to the producer. This includes products within both the crops and livestock sectors.

The professional working in this area must be able to convey its sales proposals at a level applicable to the intended audience. There will be cases where the communication will range from highly technical to more common language depending on the context of the discussion.

There is a clear need for two-way communication between the product representative and the company manufacturing or distributing the product. The Agrologist within the AM&S PA works closely with consulting Agrologists working within the *Crop Production* PA or *Livestock Production* PA. Agrologists in these two PA's provide valuable front-line, field-level information to the AM&S Agrologist. In some cases, AM&S Agrologists may also be qualified to work within the *Crop Production* PA and/or the *Livestock Production* PA and thus are able to obtain this farm and ranch-level information directly on their own. Ultimately, the appropriate product recommendation is developed by a concerted effort between Agrologists working within these two PAs. This information may need to be extrapolated by geographic areas such as district, region or designated sales territory. This information can then be used to provide information to develop advertising and related sales materials and programs.

2.1.3 Understand Research and Development Outcomes

Research and Development is a key area where new products are developed, tested and licensed for specific uses in the agricultural industry. The Agrologist representing a particular product line must understand how new products are developed. This applies to identifying specific market

niche the product may fit within (e.g., a geographic region or individual farming system). The product development process from testing to eventual licensing requires a detailed understanding of the science involved at many levels.

The Agrologist must be aware of the significant effort in product development. New product development requires considerable resources in terms of capital, scientific effort and testing. Knowledge of the licensing procedures and requirements for a product are essential information that must be conveyed to the producer. Research and development are key to the eventual use of the product in the production system. One must understand the details of this process and be able to clearly communicate the benefits of the product to a wide audience.

2.1.4 Managing the Marketing-Sales Continuum

Agricultural products follow the agricultural production cycle throughout the year. Throughout the year information must be transferred to the marketing and sales team. Information such as local-regional growing conditions, product success, competitors' products, and prices all can impact product marketing and sales. Any and all relevant information gained at the local level can benefit and direct future marketing strategies for a company. The Agrologist must be observant of key events that may impact future sales of the product and be able to communicate the situation to key people.

2.1.5 Market Research

Market research is an essential component of the *AM&S* PA. The Agrologist working in this PA must understand the basics of market research as agriculture becomes more complex and sophisticated. Information to support sales of a product is key to the company. The understanding of the sales process, customer relations, and sales prospects are key areas that must be addressed. Information on the use of the product must also be cross-referenced with key indicators related to commodity prices, supply and demand, international events and consumer preferences. Digital marketing and advertising programs are a great way to reach producers. They offer exposure to a wide audience as well as flexibility in targeting future clients.

2.1.6 Finance, Planning and Budgeting

Agrologists working in this PA are usually responsible for a geographic area (district, region, sales territory). *Agricultural Marketing and Sales* Agrologists may be either front-line representatives of the company or reside in head office managing logistical considerations in light of current agricultural conditions to ensure the product, service or equipment is delivered to the producer in a timely manner. They must also address the sale transaction details such as terms, financing, and sales promotions.

In addition to working directly with the producer, the sales representative must report on sales projections, crop forecasts, scheduling and logistics and other aspects of the supply chain within the area.

2.1.7 Exposure to the Agriculture Industry

Agricultural Marketing and Sales professionals attend many events that draw the farm community together. Farm expositions, trade fairs, seminars and other outreach activities provide opportunities to exchange information with the farming sector. High profile sponsorship opportunities may also be discovered. Events that focus on agriculture provide an important opportunity to display their product to a wide and broad audience. New potential clients can be found through conversations, demonstrations and other advertising programs. Targeted events sponsored by the company or public fairs and expositions allow the representative to develop a closer relationship with farmers and ranchers. These events also allow the Agrologist to network

with industry experts and gives them the opportunity to stay informed on new and competitive products in the marketplace.

The agricultural events allow for marketing specialists to evaluate their advertising programs directly with the farm community. This exposure allows for these professionals to gain new marketing ideas and concepts which may form the basis of future marketing materials and media such as print, internet, radio and television.

3. Knowledge Requirements

Knowledge requirements are technical and scientific areas of knowledge that are essential to professional practice within the PA (Table 1). These requirements consist of core knowledge areas consisting of one or more specialized subject matter areas that are foundational to the PA.

The specification of subject matter within each required core knowledge area provides assurance that members working within the PA have the necessary fundamental knowledge to practice. The subject matter within each core knowledge area represent specific scientific or technical knowledge relevant to the PA activities. The subject matters within each core knowledge area represent areas of study equivalent to a three-credit course in a post-secondary educational institution. Subject matter knowledge is normally obtained through education in a degree or diploma program; however, knowledge in certain subject matter areas may be obtained via industry courses, work experience self-study and mentorship. To assure the public that practitioners have acquired knowledge via work experience, self-study or mentorship, such knowledge needs to be validated through a challenge exam process implemented by the AIA

It is the responsibility of members to review Table 1, conduct self-assessments and identify how their knowledge and expertise aligns with the required subject matters. Members who do not meet a required subject matter within a core knowledge area related to their professional practice, will be required to address the deficiency before practicing unsupervised in relation to that core knowledge area. Members are expected to work toward updating their knowledge where they are lacking specific subject matters for the activities related to their practice. ***Where regulated members do not meet a knowledge requirement for a subject matter, they are required to address the deficiency by doing one of the following three things:***

1. **Seek Advice and Direction:** Members lacking specific knowledge in required subject matters must recognize the limits of their expertise and seek advice and direction from a qualified professional.
2. **Complete Challenge Exam(s):** To validate that subject matter knowledge has been gained through work experience, self-study or non-adjudicated industry courses, a member may choose to either (i) write a professional practice examination supplied by the AIA; or, (ii) to appear before a panel of peers to complete an oral examination supplied by the AIA;
3. **Pursue Formal Education and Training:** Obtain credit in a formal course from an appropriate educational institution or from an industry course approved by the AIA (e.g. CCA certification courses; Certified Crop Science Consultant program through the University of Saskatchewan). Such courses must have an adjudicated examination to document knowledge attained.

3.1 Core Knowledge Areas

Several core knowledge areas have been identified as being foundational to practice within the PA (Table 1). These include core knowledge in Communications; General Agriculture; Market Fundamentals; and Economics.

Core knowledge areas consist of both required subject matters and recommended subject matters. Required subject matters represent the minimum credible knowledge required for the given core knowledge area and are mandatory for members who wish to provide professional advice or services related to the core knowledge area.

Recommended subject matters represent knowledge that is not mandatory but provide increased depth of knowledge related to the core knowledge area. These subject matters are highly recommended and have been identified to provide direction to members for their continuing competence program.

3.1.1 Communications

The knowledge of the communications process is essential to *Agricultural Marketing and Sales* professionals. Clear verbal, written, active listening, teamwork and collaboration and conflict resolution skills are required to effectively complete the sales and service process. These skills are necessary to build loyalty and trust in the relationship between the vendor and buyer. The individual's success in this PA is greatly enhanced with knowledge of communications.

3.1.2 General Agriculture

Knowledge of general agriculture is important as the professional working in this area must understand the diversity of agricultural and food production systems. This scope of this PA covers a wide range of agricultural sectors, as all sectors use inputs in their production processes.

An understanding of production cycles within a given agricultural sector (e.g. crops vs. livestock) is vital to the Agriologist practicing in this PA. It is important to understand that agriculture is not homogenous, and that farms have unique characteristics. The agricultural industry operates at many scales and is influenced by global, national, provincial and regional factors.

3.1.3 Market Fundamentals

Marketing fundamentals are a core knowledge area as this forms the basis of initiating and enhancing the sales process. The need to understand marketing strategy in relation to the product, cost, and service will produce results in terms of customer satisfaction and loyalty. These fundamentals will include the product life cycle, market segments, promotion (advertising) and strategic approaches to marketing.

3.1.4 Economics

A basic understanding of agricultural economics is an important component of agriculture in general and more important in marketing and sales. There is a need to understand how economic policy affect markets, supply and demand, and producer/consumer behaviors. Economics will also provide an understanding of how people make purchasing decisions. An understanding of the drivers controlling agricultural economics will increase the Agriologist's ability to relate to economic decisions at the farm-gate level.

Table 1. Core knowledge areas, required subject matter areas and recommended subject matter areas for the agriculture marketing and sales practice area

Required Core Knowledge Area	Required Subject Matter Areas	Recommended Subject Matter Areas
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Communications	<ul style="list-style-type: none"> • Introductory Communications 	<ul style="list-style-type: none"> • Business Communications • Interpersonal Communications • Conflict Resolution
General Agriculture*	<ul style="list-style-type: none"> • At least two of the following: <ul style="list-style-type: none"> • Intro Crop Science OR • Intro Animal Science OR • Intro Horticulture OR • Intro Agroforestry OR • Industrial Vegetation Management OR • Agricultural Machinery OR • Land Management Technologies 	<ul style="list-style-type: none"> • Pest Management • Soil Fertility • Environmental Impacts of Agricultural Practices (Agricultural Ecology)
Market Fundamentals	<ul style="list-style-type: none"> • Introductory Marketing 	<ul style="list-style-type: none"> • Financial Management • Business Management
Economics	<ul style="list-style-type: none"> • Introductory Agricultural Economics 	<ul style="list-style-type: none"> • Farm Business Management • Commodity Markets
<p><i>* At least two of the seven required subject matter areas that corresponds with the marketing and sales focus of the member in either crops, livestock, horticulture, agroforestry, industrial vegetation management, agricultural machinery or land management technologies.</i></p> <p><i>Knowledge of a subject matter area may be based on an individual course or be part of multiple courses. For example, knowledge in crop science may be obtained via a crop science course or through portions of other courses such as introductory plant science, crop physiology, or crop specific courses.</i></p>		

4. Work Experience

Work experience represents a source of knowledge that is gained through professional practice rather than through educational training. Such experience facilitates development of skill sets and attaining of knowledge needed to be competent within one's practice. Development of these skill sets and knowledge takes time working in an environment where feedback is available to hone one's skills and develop experiential knowledge.

Three levels of work experience are recognized within the Practice Standard. These include:

- a) Junior Level (0 to < 3 years) – The junior level of experience coincides with entry level personnel who have recently graduated from an appropriate educational program or have recently begun offering professional services in the PA. This work experience is conducted under supervision by qualified practitioners within the PA. Practitioners at the junior level are considered to have limited experience to provide wholly unsupervised professional services.

- b) Intermediate level (3 to < 10 years) – The intermediate practitioner no longer requires complete direct supervision and has developed skills and obtained the necessary experiential knowledge to take responsibility for their work. Intermediate practitioners may act as mentors for junior personnel and also seek mentoring from senior level personnel.
- c) Senior level (≥ 10 years) – Senior level practitioners generally provide supervision to intermediate and junior personnel. They are often recognized as knowledge experts by their peers and are often sought after for advice and counsel.

Members will strive to ensure that they have sufficient work experience to conduct the work and accept responsibility for the work they do. The time frames indicated above and in Table 2 are provided for guidance. Career progression and work experience may vary by individual.

Table 2. Typical years of work experience and examples of job duties and responsibilities.

Level of Experience	Examples of Typical Job Duties	Key Responsibilities
Junior (typically < 3 years)	<ul style="list-style-type: none"> • Data collection and compilation • Preliminary field observation • Job shadowing of intermediate and/or senior personnel • Preliminary data analysis and interpretation • Learning nature of the business • Supervised recommendations • Build contacts • Attending industry meetings • Professional development 	<ul style="list-style-type: none"> • Self-development and demonstration of initiative • Be flexible to different work environments • Be part of team environment • Recognize the limits of one's knowledge and seek to advance one's knowledge. • Taking responsibility for their job duties and overall work performance
Intermediate (typically 3 to < 10 years)	<ul style="list-style-type: none"> • Data analysis, interpretation and make recommendations • Identify business improvements • Supervise and mentor junior personnel • Develop business plans, recommendation plans • Progressive development of business clients • Conduct sales and/or marketing presentations 	<ul style="list-style-type: none"> • Provide guidance and training to junior personnel • Analyze and recognize industry trends • Manage clients • Identify risk and manage accordingly • Self and professional development

Senior (typically ≥ 10 years)	<ul style="list-style-type: none"> • Conduct technical presentations • Exercise leadership role in industry • Evaluate or appraise business plans, recommendations • Strategic planning • Provide a trusted and reputable source of technical and operational expertise 	<ul style="list-style-type: none"> • Provide guidance and training to intermediate and junior personnel • Administrative and technical supervision of personnel • Coordinate with senior management regarding business strategies, etc. • Self and professional development
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4.1 Skill Sets

Certain skill sets and capabilities enhance proficiency within a given PA. Application of scientific or technical knowledge requires skill sets which have been identified under this practice standard (Table 3). Skill sets are tied to effective functioning within the PA and are usually developed during work experience or through short courses

Members practicing in this PA are required to evaluate their skills and capabilities against the information in Table 3. If deficiencies are identified, they should target their individual continuing competence programs to address those deficiencies.

Table 3. Skill sets useful for practice within the PA

Skill Sets	Description
Networking	It is important the <i>Agricultural Marketing and Sales</i> practitioners develop superior networking skills within their working environment. This includes reliable contacts that can provide strong technical information related to the nature, condition, and progress of agricultural in the area of interest. The scope of the practitioner’s network spans from producers, community leaders, industry association contacts, academics and government contacts from both regulatory and research fields.
Teamwork	The practitioner requires a diverse team of professionals to effectively and efficiently deliver the right product(s) to producers. The individual must be accountable to the sales team, understand their team’s dynamics, and provide open and honest communication. Clear direction and common goals must be in the forefront while still resolving differences in opinions.
Sales and Selling Approaches	Sales and selling are critical skills of this practice area. The individual must understand the full range of the sales process. This includes prospecting future clients and sales opportunities, knowledge of the company’s sales approaches and policies, adding value to the client and understand which techniques

	<p>may apply to specific individuals or products. The Agrologist will utilize tools such as behaviour styles and personality styles to work with their clients. The agrologist should identify the client's short- and long-term needs and goals, to best address the product and service needs for the client. The practitioner is encouraged to seek additional selling courses to provide them with options around differentiated solutions in the sales cycle. Where applicable, the agrologist will understand aspects of contract/agreement development and signing.</p>
<p>Conflict Resolution and Problem Solving</p>	<p>Conflict resolution and problem solving are vital skills for the practitioner working in this PA. These skills are required to deliver superior service to the client. In certain instances, problems related to the sales process will need to be addressed. This may range from specific products not working as stated or problems with distribution and access. The problems may extend to financial aspects of the transaction.</p>
<p>Understanding Agriculture Machinery and Equipment</p>	<p>Agricultural operations vary with different levels of automation from field to barn. Practitioners need to understand the intricacies of the machinery and equipment used in various agricultural sectors. It is important to understand capabilities and limitations of agricultural equipment as it applies to products being sold. Practitioners engage in field days and trade shows that present/provide learning opportunities related to field equipment. It is important to be aware and conversant in a client's operating equipment. Practitioners may provide "change information" and suggestions to a client as needed in the operation.</p>
<p>Sales territory management and assessment</p>	<p>Practitioners must develop an understanding of the geographic area in which they are working. Agrologists must be familiar with the types of crops grown, management practices, soil types, climate conditions etc. as they differ between regions.</p>
<p>Understanding and applying legislation, regulations, policies and standards</p>	<p>It is important for practitioners to stay current with legislation, policies and standards relevant to the PA. Practitioners must ensure clients are informed of standards and regulations that (may/do) impact their operations presently and in the future. In addition, practitioners take an active role to help guide and formulate policy change(s).</p>
<p>Extension and technology transfer</p>	<p>This skill set involves keeping current on research, new products and trends in the PA; providing relevant research information to aid your client in their operations; evaluating new products and technologies; formulating messaging to your client to enhance their operations; and, engaging in opportunities that lead to increased effectiveness in communication skills. Practitioners should look into approved continuing education courses on line, and utilize social media where applicable and practical.</p>
<p>Marketing Communications</p>	<p>The <i>AM&S</i> agrologist utilizes various forms of marketing communication with their clients. Along with traditional forms</p>

	<p>of advertising such as paper and radio, etc., they expand into social media, direct mail, and other forms of digital communication with consideration of client preferences. Remote demand continues to grow in importance and the agrologist must understand how to disseminate information and influence people and teams without being physically present.</p>
Digital Technology	<p>Digital technology encompasses many different facets such as app use on mobile devices to variable rate delivery of crop inputs such as fertilizer. Knowledge of the offering is key for the practitioner to ensure they are providing accurate, reliable information to the client. The practitioner will also need to stay current, as offerings are being updated or new ones presenting themselves to the market. Agrologists must ensure they understand both the benefits and limitations of any technology they recommend to their clients.</p>
Synthesize, analyze and interpret field and laboratory data	<p>The need for agricultural inputs is usually based on field and laboratory data. Laboratory reports are technical and require considerable training and expertise in their interpretation. The practitioner must be aware that qualified professionals are needed to validate the data in the field and laboratory report. They must seek competent Agrologists within their company or seek consultants who are knowledgeable of the results and analysis. These people are qualified to prescribe essential components of the crop or livestock production program.</p>
Report writing	<p>Practitioners must understand the company's need for information related to the products it sells and distributes. This information is supplemented with producers' comments, criticisms and endorsements. Clear and concise reports are required to make marketing and sales decisions throughout the year. Also, this information is needed for sales, production, and distribution forecasts. This information may support the next years product line and development of new product lines. Practitioners need to be well versed in reporting styles/requirements of various clients and be clear on the goal of a report. Reports need to contain facts that support recommendations or conclusions based on the situation being addressed and be submitted in a timely manner.</p>
Ethical Practice	<p>Practitioners within this PA must pay close attention to the requirements of professional ethics and ensure they conduct themselves at all times as a competent and ethical professional. As required by the general Practice Standard, the registered member will hold public interest paramount and endeavor to put service above gain and excellence above quality (Appendix A). Professional Agrologists and Registered Technologists in Agrology must adhere to the Code of Ethics for the profession as they make recommendations to their clients. The Code of Ethics states, "<i>The Profession of Agrology demands integrity, competence and objectivity in the conduct of its members while fulfilling their professional</i></p>

	<i>responsibilities to the public, the employer or client, the profession and other members.” (See Appendix B).</i>
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5. Performance Requirements

In addition to the General Practice Standard that applies to all AIA members (see Appendix A), specific performance requirements have been developed for this PA. This practice standard identifies knowledge, work experience and skill set requirements for competent practice and defines the performance and conduct expected of regulated members participating in the PA.

The following performance requirements outline the expectations of the professional practicing within the *Agricultural Marketing and Sales* PA. Failure to comply with these expectations may be considered as constituting unprofessional conduct under the *Agrology Profession Act*.

Regulated members stay current with research, legislation, directives, guidelines, industry standards and other reference documentation related to agriculture.

Regulated members:

- Regularly review the reference material used to support their practice and obtain most current versions when available.
- Attend conferences, workshops, webinars and updates related to crop development.
- Communicate with regulators, research scientists, educators and other practitioners to ensure they remain current with current agricultural knowledge and trends.

Regulated members understand the limits of their knowledge, skills and experience and seek the expertise of other professionals where necessary.

Regulated members:

- Make appropriate scientific, technical, practical and logistical decisions based on their education and experiential knowledge in agricultural marketing and sales.
- Apply their skills and use sound judgement in an ethical manner.
- Seek advice and input from other professionals when their expertise is insufficient to make competent decisions and recommendations.

Regulated members clearly understand their role within the practice area.

Regulated members:

- clearly understand their role in the practice area, represent themselves as such and do not exceed the boundaries of that role.
- only sign and seal those plans, reports, and other documents for which the members are professionally responsible, and which were prepared by or under the direction of the member.

Regulated members conduct themselves according to the Code of Ethics for the profession of Agrology and will not surrender their professional independence to outside forces or pressures.

Regulated members:

- Conduct themselves as professionals by demonstrating integrity, competence, and objectivity in their work.

- Fulfill their professional responsibilities to the public, the employer or client, the profession and other regulated members of the Agrology profession.
- Shall always conduct themselves in the best interest of protecting and serving the public, and not discard good scientific principles for personal gain (commissions, bonuses).
- Shall always maintain their professional independence and not surrender to unethical demands from their employer.

Regulated members strive for continuous improvement.

Regulated members:

- Seek advice from other professionals to enhance their knowledge of agricultural, marketing and sales practices.
- Participate in knowledge sharing with other members to advance professional practice in agricultural marketing and sales.
- Document best management practices in agricultural marketing and sales and implement these practices where feasible.

Regulated members review the requirements of this practice standard and address any practice deficiencies through their ongoing continuing competence program.

Regulated members:

- Conduct self-assessments based on education, work experience, skill set, and performance requirements indicated within this practice standard. Self-assessments can be found on the AIA website on the member home page.
- Review their self-assessment with a senior qualified professional.
- Identify any deficiencies and develop a plan to address them.
- Regularly participate in the AIA continuing competence program as required by the *Agrology Profession Act*.

6. Suggested Reference Material

Blanchard, Kenneth H. Bowles, Sheldon M. (1997) ***Gung ho!: turn on the people in any organization***. New York. Morrow.

Baer, Jay, Hug **Your Haters and How to Embrace Complaints and Keep Your Customers**, Portfolio. 2016. ISBN 1101980672

Cialdini, R. B. (2007). *Influence: The Psychology of Persuasion*. New York: Harper Collins.

Collins, James C. 1958-, **Good to Great**: [why Some Companies Make the Leap...and Others Don't]. New York, NY: Harper Audio, 2001.

Covey, Stephen R. 1989. *The 7 Habits of Highly Effective People*. Free Press. ISBN 0-7432-6951-9

Kohls, Richard L., Joseph N. Uhl. 2001. **Marketing of Agricultural Products (9th Edition)**.

7. Summary

This document describes the educational requirements, work experience, skill set and performance expectations for professional practice within the *Agricultural Marketing and Sales* practice area of the Agrology profession. It provides direction to members of the Alberta Institute of Agrologists who are practicing or who wish to work within this practice area to ensure they are qualified to provide professional services in this area.

Members practicing within this practice area are required to review this document and assess their knowledge, work experience, skill sets and performance against the requirements and expectations herein. Where deficiencies are noted members are expected to develop a plan to address these deficiencies through their individual continuing competence programs. Members are expected to understand the limits of their own knowledge and expertise and seek additional advice and professional support as required.

This practice standard will form the basis of ongoing practice reviews conducted by the Institute and the basis for review should a member be subject to a complaint. It is the responsibility of the member to be aware of the contents of this practice standard.

APPENDIX A

The following General Practice Standard applies to all registered members of the AIA. This General Practice Standard is to be adhered to as well as this detailed practice standard for the crop development practice area.

GENERAL PRACTICE STANDARD FOR ALL REGISTERED MEMBERS OF THE ALBERTA INSTITUTE OF AGROLOGISTS

The General Practice Standard applies to all registered members of the Alberta Institute of Agrologists. The purpose of the document is to describe the duties and responsibilities that are incumbent upon each member of the profession. It is the responsibility of each registered member to conduct themselves in accordance with these standards. Registered members will be measured against these standards by the Institute, the public, employers, clients and colleagues. The Standard describes the values of the Institute and the profession, and the expectation for each registered member.

PROFESSIONAL RESPONSIBILITY

Each registered member of the Alberta Institute of Agrologists (AIA) is required to uphold the standards and reputation of the agrology profession and professional principles.

Indicators

The registered member has a duty to protect the public and to conduct his or her work with an appropriate standard of care.

Standard of care: Standard of care is the legal duty to exercise the watchfulness, attention, caution and prudence that a reasonable professional in the same circumstances would exercise. If a professional's actions do not meet this standard the professional may be found negligent or to have committed unprofessional conduct.

The registered member is personally responsible and accountable for ensuring that his or her agrology practice and conduct meet the requirements of the practice area(s), practice standards, current legislation, regulations and policy.

The registered member will practice with honesty, integrity and respect, and comply with the AIA's Code of Ethics.

The registered member will sign or co-sign a report only if he or she is willing to accept full responsibility for the contents of the report.

The registered member may delegate portions of the work to competent practitioners under the registered member's direct supervision. The registered member will accept responsibility for that work and provide additional quality assurance/quality control to determine the sufficiency of that work. Registered members will not sign any document for which they will not take full responsibility for the contents of the document.

The registered member will hold the public interest paramount and endeavor to put service above gain and excellence above quantity.

COMPETENCY

The registered member will practice only in an area(s) where the member has demonstrated competence.

Indicators

The registered member will only practice unsupervised in the practice area(s) where the member's education, skills, and experience fulfill the practice area qualifications and the registered member believes he or she is competent. If a registered member's education, skills, and experience do not meet the requirements of the practice area, the member will practice *only* under the direct supervision of a qualified, registered professional who is competent to do the work and who will give appropriate direction to the registered member.

The registered member, if called upon by the profession, a judicial review or a court ordered request, must be able to clearly demonstrate the knowledge and skill sets gained to enable them to practice in any practice area(s) in which the member deems himself or herself competent to practice.

The registered member will undertake continuing professional development (CPD) with the majority of the CPD hours directly relevant to his or her practice area(s). The registered member commits to reporting his or her CPD activities on the member profile as activities are completed.

The registered member will continually update his or her scientific and standard industry practice knowledge related to the member's practice area(s).

The registered member will demonstrate critical thinking when planning, implementing and evaluating all aspects of the work and making any recommendations as a professional.

The registered member is able to show his or her reasoning in reaching decisions through accurate and clearly written documentation.

The registered member will advise the AIA of any changes to his or her practice area(s), particularly when a new practice area is chosen. The registered member will specify the knowledge and skills that have been acquired to support work in the new practice area.

PROVISION OF SERVICE TO THE PUBLIC, A CLIENT OR AN EMPLOYER

The registered member will promote the qualified, competent and ethical professional role and accountability of agrologists to the public, other professionals, and themselves.

Indicators

The registered member will prepare accurate, concise and clearly written reports and correspondence that are appropriate for the intended audience.

The registered member will communicate clearly and respectfully with a variety of people, including his or her employer, colleagues, clients, members of the public and regulators.

The registered member will advise the client if the work is outside of his or her practice area(s) and if the member will be unable to fulfil the terms of reference for the work.

The registered member will make a referral to seek advice, and enter into collaborations with other professionals in situations which require expertise that extend beyond the member's competence.

The registered member will avoid situations where a conflict of interest exists or where the duties and loyalty owed by a member to one party likely will be, is, has been, or perceived to be, in conflict with the duties or loyalties the member owes to another party.

The registered member will extend public knowledge of their area of expertise whether it is in agriculture, the environment, food sciences or life sciences, and promote factual and accurate statements on matters regarding these areas.

STEWARDSHIP

The registered member will advocate and practice good stewardship of all agricultural and environmental resources based on sound scientific principles.

Indicators

A registered member will consider monetary issues, social values, rational application of sound science, lesson of valid experiences, economic impacts to the geographic region, and impacts on future generations when conducting his or her work.

A registered member will inform the client or employer of any action planned or undertaken by the client or employer that he or she believes is detrimental to good stewardship or in breach of known legislation, regulations or policies.

SAFETY

The registered member understands his or her obligation for promoting public and worker safety and considers the health of the environment, health of the consumer, industrial safety, construction safety and the general operational safety of projects.

Indicators

A registered member will demonstrate concern for the immediate and long-term direct effects of agricultural and environmental practices on the safety of workers by being aware of, and evaluating risks.

A registered member will balance the claims of farmers and ranchers and needs and wants of a consuming public against the potentially competing claims for safety of the environment and the interests of individuals and businesses affected by their proximity to agricultural operations. The registered member is aware that the public expects and demands a safe supply of food, not only for current use but also for future generations.

APPENDIX B

CODE OF ETHICS

“The Profession of Agrology demands integrity, competence and objectivity in the conduct of its members while fulfilling their professional responsibilities to the public, the employer or client, the profession and other members.”

Members should be aware of any other laws and responsibilities in regard to other business and voluntary activities which may impact their ethical conduct.

Guidelines to the Ethical Responsibilities of Agrologists

The purpose of the following guideline is to clarify the intent of the Code of Ethics and the understanding of the nature of the professional obligations that arise out of the document. Throughout, it is recognized that membership is a right granted by the public to the regulated member (member) to practice Agrology in such a way that the public interest is served. It is also understood that, just as the individual member has an obligation to conduct business in an ethical and competent manner, colleagues and the Institute share the moral responsibility of protecting their Agrologists and the field of agrology against any unfounded and unjust criticisms.

1) Among the regulated member’s professional obligations to the public are the responsibilities:

a) To practice only in those practice areas where the member’s training, ability, and experience make him/her professionally qualified.

The public has given a right to the Professional with the trust and expectation that those activities are undertaken with competence. A member will not make misleading statements regarding his/her qualifications. A member will actively pursue professional knowledge upgrading specific to their practice area(s) in order to remain competent in his/her field of expertise. A member will make referrals to seek advice, and enter into collaborations with other professionals in situations which require expertise that extend beyond the individual member’s competence.

b) To express a professional opinion only when it is founded on adequate knowledge and experience, and where the member has an understanding of the situation and context in which this opinion is being offered.

Members must clearly distinguish among facts, assumptions and opinions in their preparation of reports and professional statements. Professional opinions should be clearly stated and should include clear indications of the constraints that apply to the opinion, and the relevant qualifying circumstances, facts and assumptions.

Members should exercise care that work they conduct cannot in any way be seen to support or make possible any morally suspect or illegal purposes. In the extreme, this caution might cause a member to refrain from association with enterprises or individuals whose objectives and probity are subject to questions.

Members who act as expert witnesses and provide opinion evidence for the purpose of litigation should not take a partisan position. Agrologists must provide evidence as impartial experts and must not do so as advocates of their client or employer. While acting as an expert witness, a member’s role is to assist the judge/jury/panel with technical matters which are beyond the expertise of the tribunal.

c) To advocate and practice good stewardship of all agricultural and environmental resources based on sound scientific principles(s).

Stewardship requires making complex choices based on a variety of relevant but not necessarily compatible factors. Good stewards must consider, but not necessarily be limited to: monetary matters, social values, the rational application of sound science, the lessons of valid experience, impacts on the economic health of the community at large, and the impacts on future generations. Because of the position of public trust, a member's duty is to uphold professional principles above and beyond the demands of employment.

Conflict may arise between a member's duty to uphold professional principles and the duty to serve the needs of an employer or a client. Members must distinguish between the role they play as Agrologists and the role management plays. Managers have prerogatives and privilege for making decisions based on a wider range of constraints than those that might be appropriate for an Agrologist. The member must not confuse the role of providing others with information upon which to base a decision with the role of being responsible for making the decision him or herself.

If a member believes there is a serious conflict between the requirements of employment and a member's professional principles, a member should inform/or consult the Registrar or any other appropriate persons about the conflict. Members may seek advice and support for the position from the Institute.

d) To extend public knowledge of agriculture and the environment and to promote truthful and accurate statements on sustainable agricultural systems and environmental matters.

Members should strive to develop appropriate involvement with schools, agencies and organizations insofar as such outreach activities can help ensure the dissemination and discovery of sound and appropriate agricultural environment knowledge. Members should attempt to correct misleading or erroneous statements on agricultural matters whenever and wherever such statements are encountered.

e) To have proper regard for the safety of others in all work.

Members must understand their obligation for promoting safety. Members should consider the impact the exercise of their professional duties will have upon the health of the environment, industrial safety, and health of the consumer, construction safety and the general operational safety of completed projects. Members must demonstrate concern for the immediate and long-term direct effects of agricultural and environmental practices on the safety of workers by being aware of and evaluating risks.

The public expects and demands a safe supply of food, not only for current but also for future generations. Members must balance the claims of producers and consuming public against the potentially competing claims for safety of the environment and the interests of individuals and businesses affected by their proximity to agricultural operations.

2) A member's responsibility to the client or Employer is:

a) To act conscientiously and diligently in providing professional services.

Members should endeavour to put service above gain and excellence above quantity. If a member becomes aware of errors or omissions in his/her work, he/she must report the same to his/her client or employer, and immediately work to remedy such errors or omissions.

Expect as required by law, to maintain the confidentiality of client and employer information unless given the explicit consent of the client or employer.

b) A member should consider all information received from a client or employer as confidential unless such information is in the public domain.

Information obtained during and specific to a professional contract situation is confidential and must not be disclosed to others or used by the members outside that contracted situation without the consent of the client or employer. However, technical expertise gained by a member through work may be used in subsequent projects without consent from other parties.

c) To obtain a clear understanding of the client's or employer's objectives.

Members must clearly understand the objectives of the client or employer. Members must make inquiries regarding such objectives to ensure that professional services are provided in the context of complete and accurate information. It is recommended that all oral communication that is material to the delivery of professional services be confirmed in writing.

d) To inform the client or employer of any action planned or undertaken by the client or employer that a member believes is detrimental to good stewardship or in breach of known laws or regulations.

It is a member's duty to advise a client or employer of the consequence of questionable actions and inform the client or employer of the facts that lead the member's belief that the action is detrimental to good stewardship.

e) To refuse any assignment that creates a conflict of interest.

A conflict of interest exists where the duties and loyalty owed by a member to one party are, are likely to become, or to a reasonable, informed and objective observer would appear to be in conflict with the duties or loyalties the member owes to another party.

A member should not accept an assignment in which he/she has a personal or business interest unless that interest is disclosed and approved by the client or employer.

Where a member is in a position of providing professional services to more than one party with different interests in the same or related matter, the member must explain the significance of acting for more than one party to each of the affected clients or employer(s) (the parties) and obtain the written consent of the parties to continue working for more than one party. If any of the parties fail to give their consent the member must then determine whether it is possible to act on behalf of a subset of the parties without conflict. If conflict cannot be eliminated by acting only on behalf some of the parties, then the member should advise all the parties that he/she cannot continue to act for any of them in the matter that generates the conflict of interest.

Members must also advise the parties that no information received in connection with the common matter from the one can be treated as confidential so far as any of the other parties are concerned.

f) To not accept compensation from more than one employer or client for the same work, without the consent of all.

Members need to distinguish between the data or product, which becomes the property of the client; and the process or technical experience, which remains the property of the member.

3) The Agrologist's Responsibility to the Profession is:

a) To inspire confidence in Agrology by maintaining high standards in conduct and work.

A member must keep in mind that the work of an Agrologist is continuously open for public scrutiny and it is the responsibility of each individual to build and maintain a positive image of the field and the profession. Not only must a member perform his/her duties of employment to a high level of excellence, but the conduct of that member must also be of high standard.

b) To support activities for the advancement of the profession.

Members have an obligation to participate in the activities of the Institute (i.e., meetings, elections, holding office, mentoring) as the individual members situation and opportunities allow.

Members need to be constantly aware they are Agrologists and should, by their conduct, provide a positive image of the profession. Each member must be prepared to personally promote Agrology in personal contacts and communications, and to participate in specific promotional initiatives organized by the professional organizations.

c) Where a member believes another individual may be guilty of infamous or unprofessional conduct, negligence or breach of the Agrology Profession Act or bylaws:

to raise the matter with that individual and

if not resolved or if otherwise deemed necessary to inform the Registrar of the Institute in writing.

A member should ensure that the facts and understanding of the misconduct are correct. Consultation with a colleague or Registrar is encouraged if it may help clarify the issue. Members should make every effort to raise and resolve the issue in a candid and professional manner. Agrologists should note that only in exceptional circumstances is it inappropriate to raise such a matter with the other member if done courteously and politely.

d) To state clearly on whose behalf professional statements or opinions are made.

A professional opinion or statement prepared by an Agrologist is for a specific situation and set of circumstances. The content of a professional opinion should include the context in which it is made.

e) To sign and seal only those plans, reports, and other documents for which the members are professionally responsible and which were prepared by or under the direction of the member.

Members who affix their seal and/or signature assume responsibility for and understand the document. The responsible professional must have exercised sufficient control and association with the document so he/she can sign and seal the document based on personal knowledge. Members will not associate themselves with documents, reports or statements that misrepresent, distort or omit material facts. Members should familiarize themselves with information that details the procedures and protocols that are associated with the use and practice of sealing professional works.

4) A member's professional responsibility to other members is:

a) To abstain from undignified or misrepresentative public communication with or about members.

Conduct between members should be characterized by respect, courtesy, honesty, and good faith. Direct and honest criticism between professionals is acceptable and professional debate is encouraged when characterized by fairness and propriety.

Members should be courteous when criticizing the work of another member and be as careful with a colleague's reputation as they would be with their own. Members will advise another regulated member in advance if they are reviewing/critiquing the other's work for a specific project. An individual member will not make statements or representations on behalf of the Institute without prior authorization.

b) To give credit for professional work to whom credit is due.

Members should always acknowledge the work and contributions of others when directly using that work in whole or in part. Members should clearly understand and appreciate that the unpaid use of marketable processes and technology developed by another member could jeopardise that other member's livelihood.

Members will follow the rules and law of copyright. Members will secure releases for any data, process (es), and publication(s) obtained from written or electronic sources.

c) To share knowledge and experience with other members.

Each member has a duty to new members and to the future of the Institute to be available as a mentor for new members. Individual members should offer and seek out constructive professional discussion and debates with colleagues to maintain a vibrant and progressive profession.

Code of Ethics, Revised September, 2010