

VOL. 1
ISSUE 1



BUILDING YOUR DREAM TEAM:
THE REBATE MANAGEMENT

SUPER SQUAD



enable

Navigating the complexities of rebate management can feel like a puzzle. Every team member is a crucial piece – and when they all click into place, voilà! Success is in sight. Think of it as a group of superheroes, each with unique powers, working together to conquer the challenges of rebate management.

It's no secret that many businesses run into snags when it comes to team capacity. The volume of data, the need for accuracy in rebate calculations and the delicate dance of managing partner relationships can overwhelm even the most seasoned teams.

These are often a result of a lack of specialized knowledge, inadequate tools, and inefficient processes – further complicating rebate management efforts and highlighting the need for a well-structured, skilled and equipped rebate management team.

BUT HOW DO YOU ENSURE YOU'RE PREPARED TO ASSEMBLE A TEAM OF SUPERHEROES?

IN THIS GUIDE, YOU'LL LEARN ABOUT:

1.

IDENTIFYING THE ESSENTIAL HEROES

The key roles in building the best rebate management team and their unique superpowers.

2.

TRAINING YOUR ELITE SQUAD

Discover how to equip your team with a detailed 30-60-90-day training regimen to broaden their skillset and transform them into powerful members of your squad.

3.

SKILL ENHANCEMENT

Uncover methods to pinpoint areas where your team may need additional training or new skills to tackle upcoming challenges with confidence.

MEET THE KEY STAKEHOLDERS IN YOUR REBATE MANAGEMENT SUPER SQUAD

So, you're setting out to assemble your rebate management team – much like a superhero forming a team of exceptional individuals each with unique talents: stakeholder management, navigating incomplete information and making risk-based decisions.

The first step? Understanding exactly what roles are needed, the skills each team member should bring to the table, and what their day-to-day tasks will look like. This lays the foundation for your journey in crafting a team that's not just capable, but exceptional.

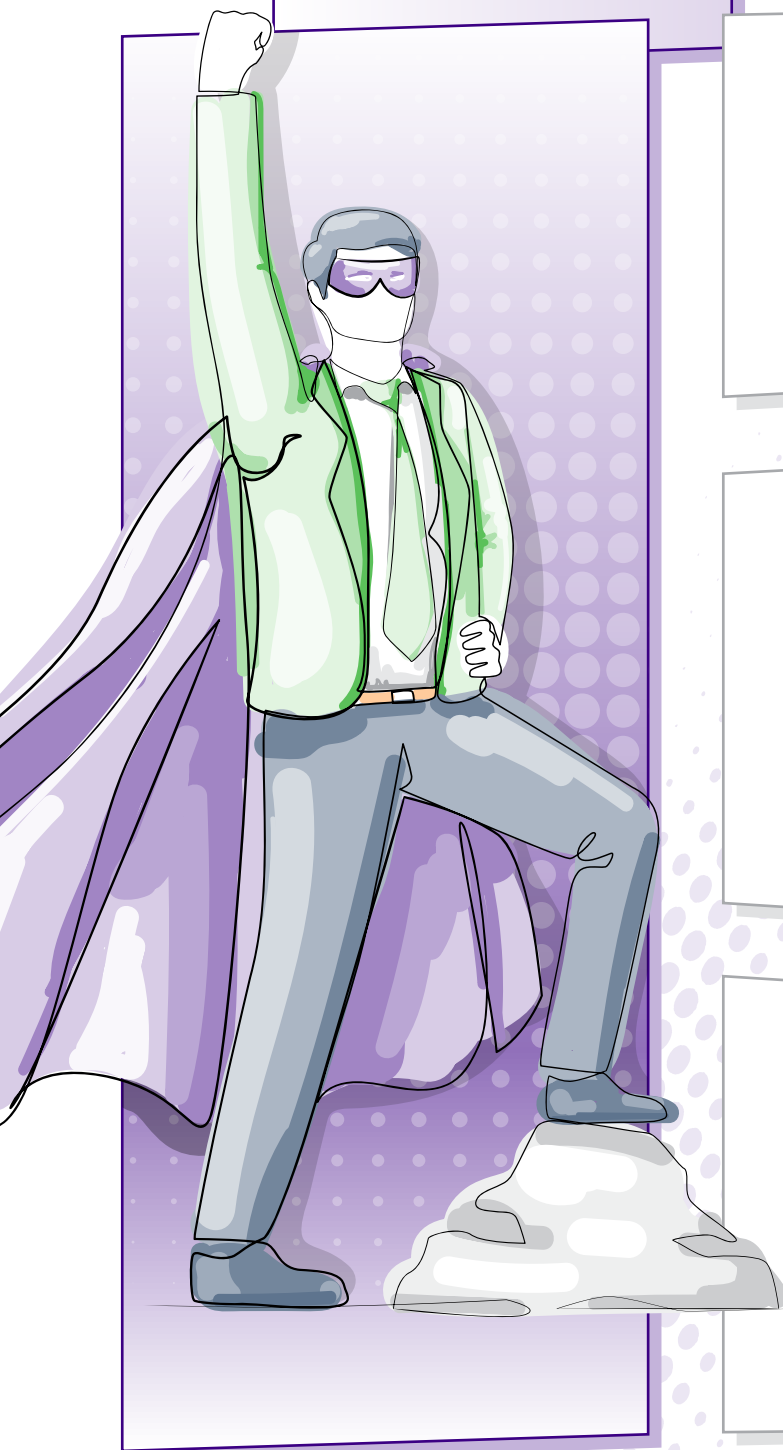


PRO TIP

Are you hiring a new member of your squad? Use the job profiles on the following pages as a starting point and customize them to fit your specific needs, whether you're on the buying or the selling side.

FINANCE BASED ROLES

SENIOR FINANCE MANAGER



JOB DESCRIPTION

The Senior Finance Manager is pivotal in managing the financial aspects of rebate agreements, ensuring compliance and accuracy. This role ensures rebate agreements are financially robust and strategically aligned with the company's broader goals.

KEY RESPONSIBILITIES

- Monitor cash flow and working capital, and manage rebate programs for optimal financial performance.
- Develop long-term rebate strategies, manage capital expenditures and assess financial risks.
- Ensure adherence to financial policies and compliance regulations.
- Lead the finance team and collaborate with key stakeholders to maximize rebate benefits.

ESSENTIAL SKILLS

- Deep understanding of financial principles, budgeting, forecasting, and cost management.
- Ability to develop and implement long-term rebate strategies, assess risks and align financial planning with overall business objectives.
- Strong communication and relationship management skills.
- Proficiency in financial software and analytical tools.

ACCOUNTS PAYABLE CLERK**JOB DESCRIPTION**

The Accounts Payable Clerk is responsible for managing and processing rebate payments to vendors, trading partners, and customers. This role involves ensuring the accurate and timely disbursement of rebate funds, maintaining detailed records and collaborating closely with the wider rebate and finance teams.

KEY RESPONSIBILITIES

- Review and process invoices in an accurate and timely manner.
- Provide an excellent service to suppliers when dealing with queries.
- Allocate manual cash payments and clear direct debit settlements against supplier accounts.
- Update supplier ledger information for new and existing suppliers.

ESSENTIAL SKILLS

- A self-starter and 'can do' attitude.
- Excellent telephone manner and communication skills.
- Efficiency and accuracy when dealing with high volume transactions.
- The ability to work on own initiative and under pressure.



ACCOUNTS RECEIVABLE CLERK

JOB DESCRIPTION

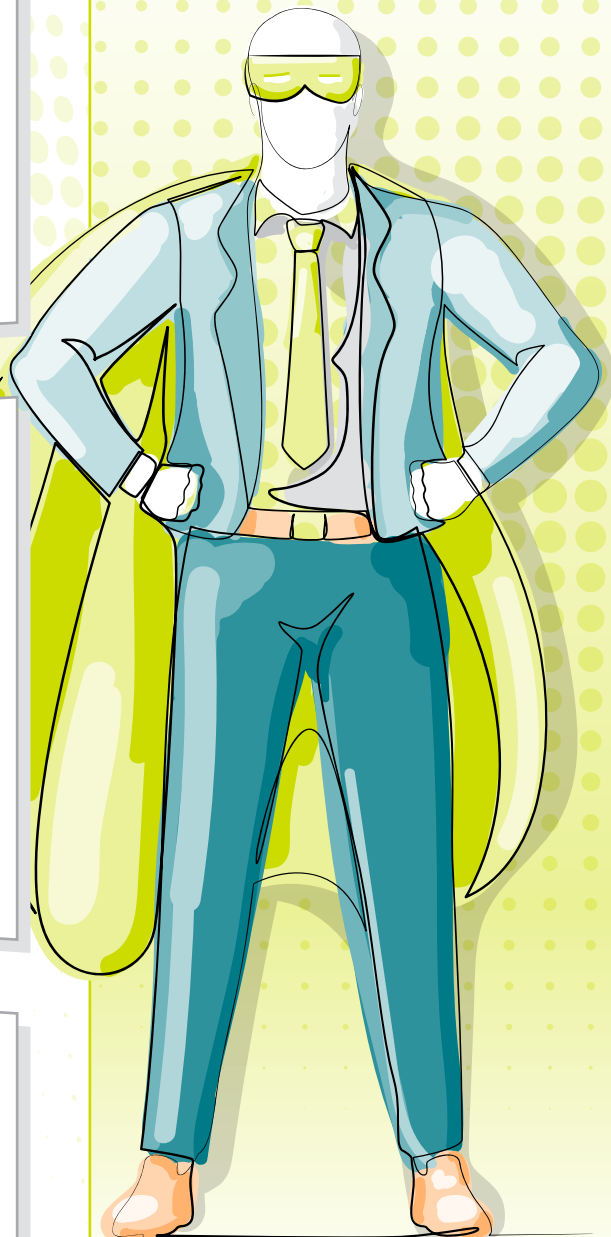
The Accounts Receivable Clerk is responsible for the management of the accounts receivable ledger, ensuring timely cash collection and resolution of issues, queries and account reconciliation. This role involves monitoring customer accounts, reconciling financial records, and maintaining positive relationships with clients.

KEY RESPONSIBILITIES

- Ensure collection of rebates owed to the business.
- Monitor outstanding receivables and proactively chase overdue payments.
- Handle monthly accruals, payment tracking and other financial reporting tasks.
- Collaborate across departments to streamline processes and promptly resolve any issues.

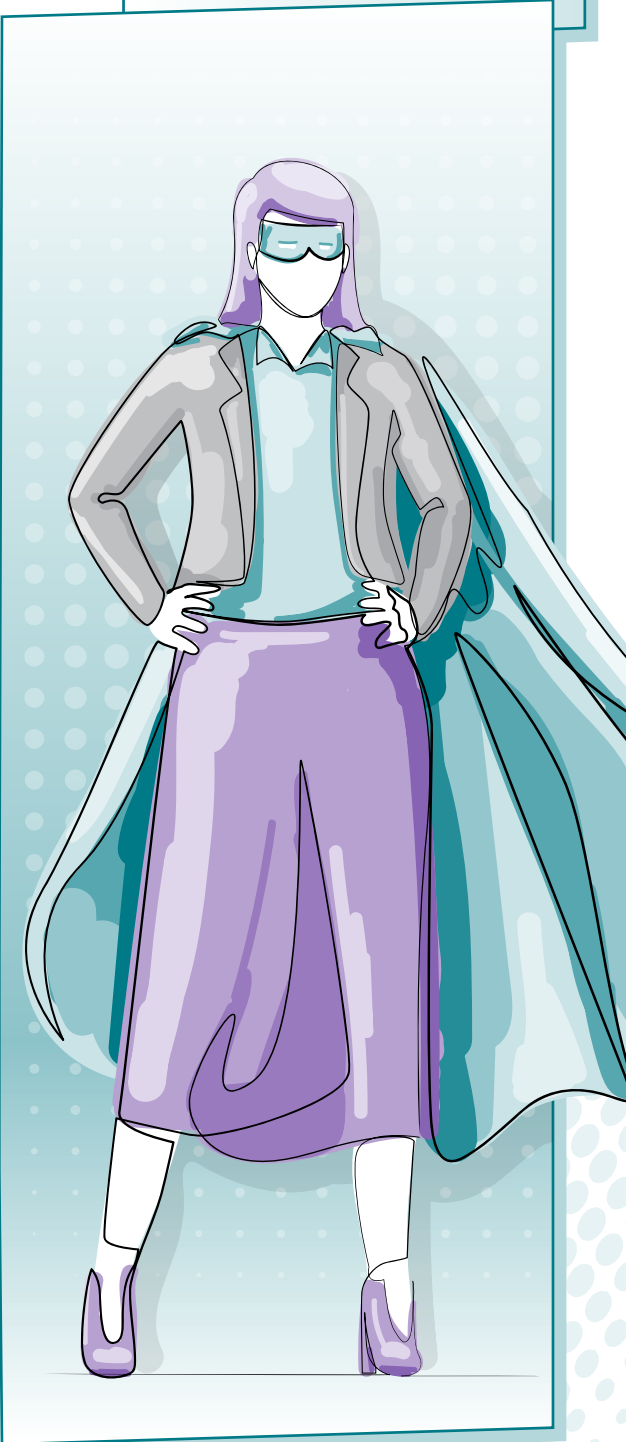
ESSENTIAL SKILLS

- Experience with accounting software.
- Good interpersonal and communication skills.
- Strong organizational and analytical skills.
- Attention to detail and high levels of accuracy.



COMMERCIAL FOCUSED ROLES

COMMERCIAL MANAGER



JOB DESCRIPTION

The Commercial Manager is responsible for overseeing and leading the company's commercial operations and strategies, particularly focusing on maximizing profitability and ensuring the commercial success of the business. They play a crucial role in driving business growth and revenue while ensuring commercial activities align with the company's overall strategic objectives.

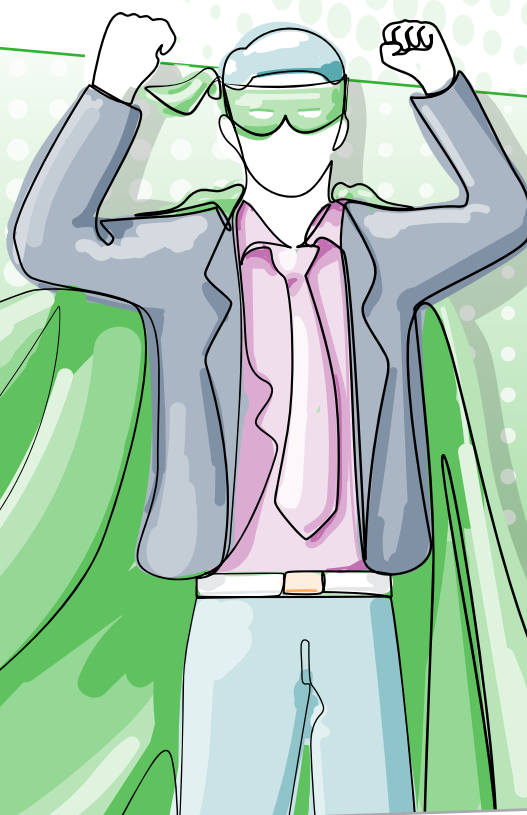
KEY RESPONSIBILITIES

- Strategize and implement commercial plans focused on leveraging rebate programs for business growth.
- Analyze market trends to identify rebate opportunities and optimize existing agreements.
- Foster strong relationships with clients and partners, ensuring rebate agreements meet mutual business objectives.
- Coordinate with internal teams to align rebate strategies with sales, marketing and financial goals.
- Negotiate and manage rebate contracts, ensuring compliance and maximizing profitability.

ESSENTIAL SKILLS

- Proficient in strategic planning and execution within the context of rebate management.
- Skilled in analyzing data to drive rebate strategy decisions.
- Strong negotiation skills, with a focus on creating beneficial rebate agreements.
- Excellent communication abilities for effective collaboration and relationship building.
- Ability to manage multiple projects and adapt to changing market conditions.

PURCHASING MANAGER



JOB DESCRIPTION

The Purchasing Manager is responsible for the day-to-day management of rebate agreements, ensuring operational execution and monitoring program performance. This role involves close collaboration with suppliers and internal teams to achieve optimal rebate objectives.

KEY RESPONSIBILITIES

- Oversee the operational execution of rebate programs.
- Monitor and report on the performance of rebate agreements.
- Collaborate with suppliers to ensure smooth program execution.
- Manage internal stakeholder relationships to align efforts and achieve objectives.

ESSENTIAL SKILLS

- Strong project management and communication skills.
- Ability to build and maintain relationships with suppliers and internal teams.
- Analytical skills to assess program performance.
- Proficiency in data management and reporting tools.

JOB DESCRIPTION

The Pricing Manager is responsible for developing and implementing pricing strategies that maximize profitability while aligning with the company's rebate goals. This role requires a deep understanding of market trends, competitor pricing and financial analysis to support informed business decisions.

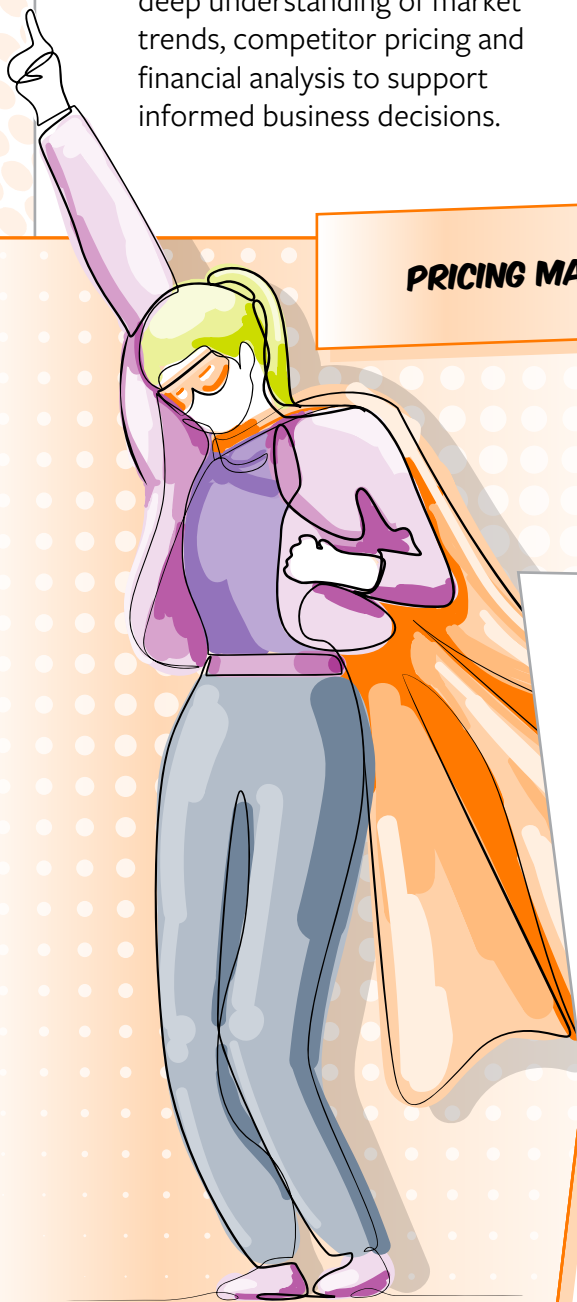
PRICING MANAGER

KEY RESPONSIBILITIES

- Develop and implement pricing models and strategies.
- Perform detailed financial analysis to evaluate the impact of pricing decisions.
- Maintain and update pricing databases and systems to ensure accuracy.
- Continuously monitor and adjust pricing strategies.

ESSENTIAL SKILLS

- Strong analytical and quantitative skills.
- Excellent communication skills, with the ability to convey complex information.
- Proven ability to influence and engage stakeholders across the business.
- Proficiency in pricing software, data analysis tools, and Microsoft Excel.



REBATE FOCUSED ROLES

REBATE MANAGER

JOB DESCRIPTION

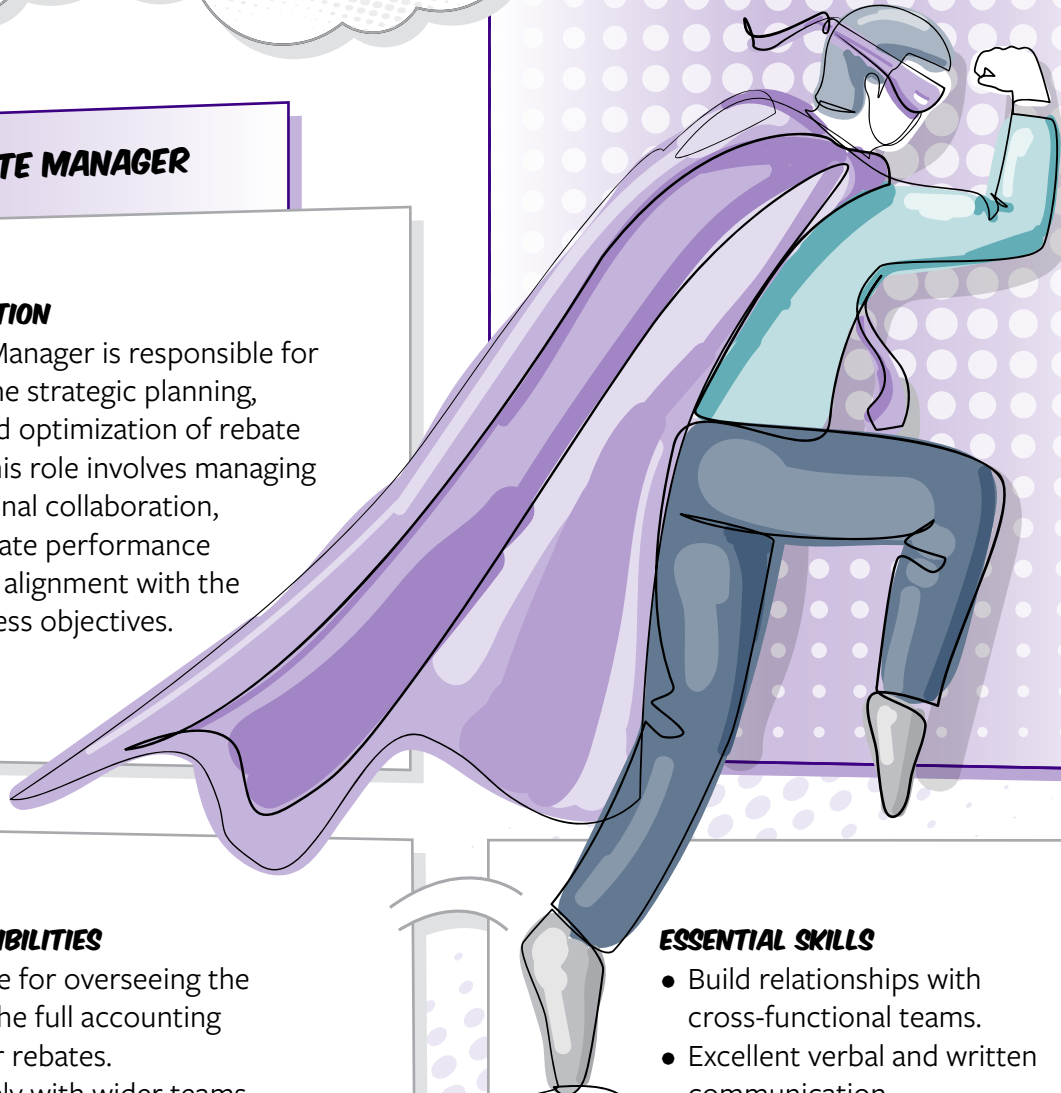
The Rebate Manager is responsible for overseeing the strategic planning, execution and optimization of rebate programs. This role involves managing cross-functional collaboration, analyzing rebate performance and ensuring alignment with the overall business objectives.

KEY RESPONSIBILITIES

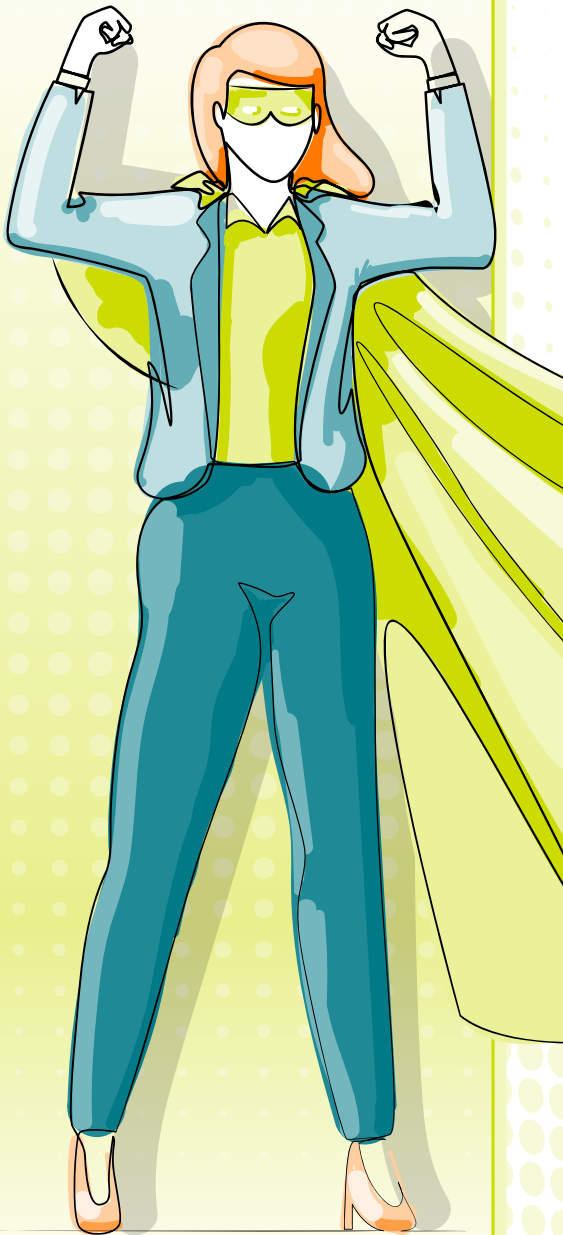
- Responsible for overseeing the quality of the full accounting process for rebates.
- Work closely with wider teams to ensure seamless rebate program execution.
- Continuously evaluate and improve rebate management processes.
- Prepare and present detailed reports on rebate program performance.

ESSENTIAL SKILLS

- Build relationships with cross-functional teams.
- Excellent verbal and written communication.
- Strong ability to analyze data and make data-driven decisions.
- Fundamental awareness of accounting principles.



REBATE ADMINISTRATOR



JOB DESCRIPTION

The Rebate Administrator manages the administrative tasks associated with rebate programs, including data entry, claim processing and documentation. This role ensures the accurate and efficient administration of rebate programs.

KEY RESPONSIBILITIES

- Manage data entry and processing of rebate claims or payments.
- Maintain accurate and organized documentation for rebate programs.
- Support the wider rebate team with administrative tasks.
- Ensure timely and accurate administration of rebate agreements.

ESSENTIAL SKILLS

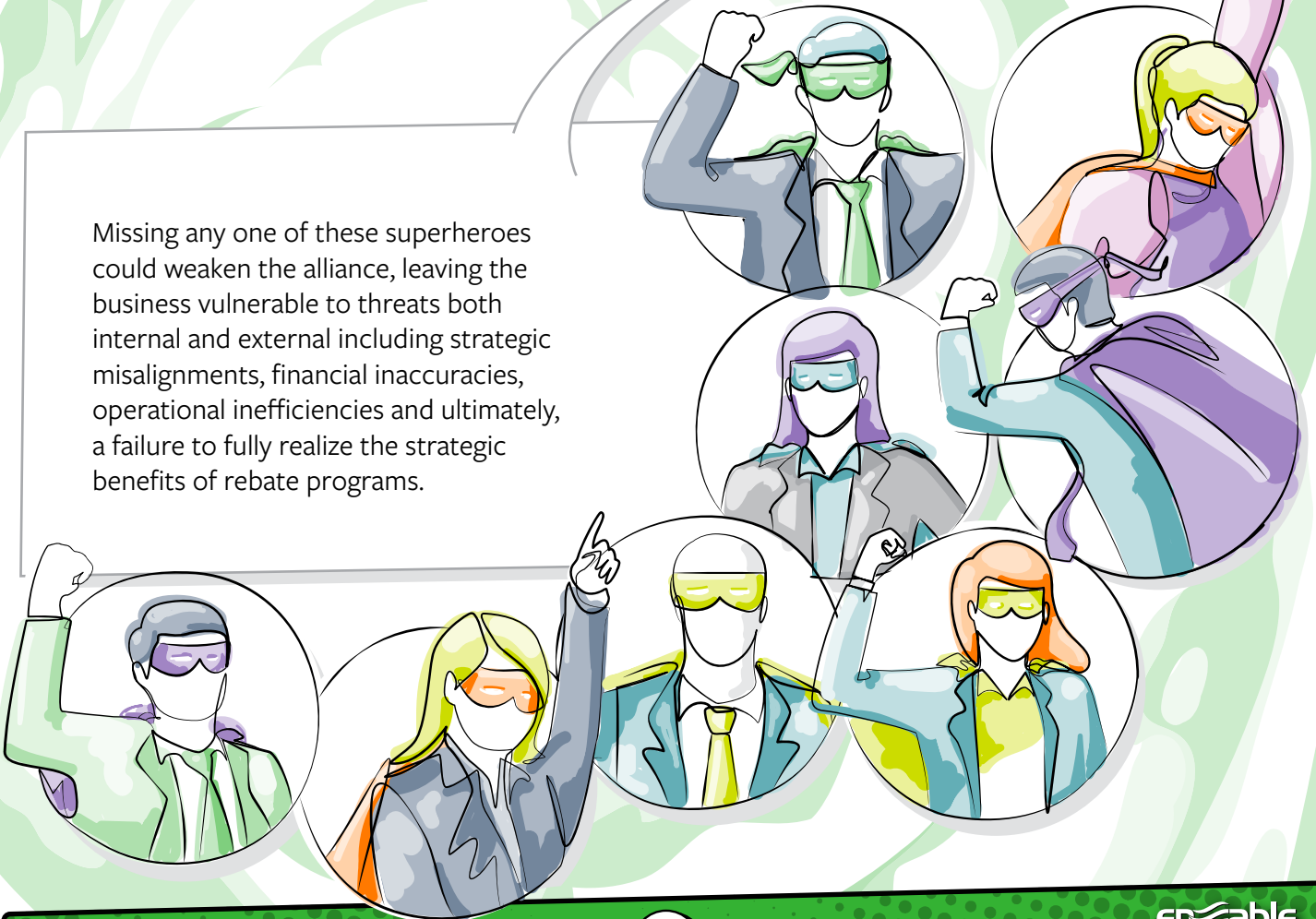
- Excellent organizational and data management skills.
- Attention to detail and problem-solving abilities.
- Proficiency in data management tools and software.
- Strong communication and teamwork skills.

A UNIFIED TEAM OF FINANCE, COMMERCIAL AND PURCHASING EXPERTS

This league of extraordinary individuals – everyone from Finance, Commercial to Purchasing teams – each plays a unique part in ensuring that rebate agreements are not only financially sound and compliant but also strategically aligned with the company’s broader objectives.

Take the Senior Finance Manager, for example. Without their guidance, we might miss out on key revenue opportunities because the financial oversight and strategic direction of our rebate programs could go off track. Similarly, without someone like the Purchasing Manager, we might end up with less favorable terms. Their skills in negotiation and managing supplier relationships are vital for securing advantageous deals.

Missing any one of these superheroes could weaken the alliance, leaving the business vulnerable to threats both internal and external including strategic misalignments, financial inaccuracies, operational inefficiencies and ultimately, a failure to fully realize the strategic benefits of rebate programs.



DEVELOPING A SUPERCHARGED 30-60-90 DAY PLAN FOR EVERY HERO

A 30-60-90-day plan is a resource outlining the goals and strategies for a new employee within the first 90 days of their rebate management role. This structured approach acts as a superhero's training manual, allowing your team to transition smoothly into their new roles. It ensures they understand their responsibilities, the expectations placed upon them and how they can contribute to the organization's mission from the outset.

	30 DAYS	60 DAYS	90 DAYS
SENIOR FINANCE MANAGER	<ul style="list-style-type: none"> • Understand the financial landscape, focusing on rebate processes. • Observe team interactions to find collaboration opportunities. • Build relationships with key stakeholders and align on goals. 	<ul style="list-style-type: none"> • Use data to identify quick wins and areas for improvement. • Build and enhance relationships with key stakeholders for greater impact. • Review rebate agreements and financial reports to assess past performance. 	<ul style="list-style-type: none"> • Explore how technology can improve team effectiveness. • Present a comprehensive rebate strategy to stakeholders. • Set up a continuous review and improvement process for rebates.
COMMERCIAL MANAGER	<ul style="list-style-type: none"> • Understand commercial goals and the role of rebates. • Review client contracts and provide recommendations. • Align with sales, purchasing, and finance teams on objectives. 	<ul style="list-style-type: none"> • Build and deepen long-term client relationships with a commercial focus. • Analyze reports to enhance rebate strategies and performance. • Support in drafting, negotiating, and managing commercial contracts. 	<ul style="list-style-type: none"> • Create new commercial strategies with a focus on growth. • Support performance reporting meetings and contract reviews. • Identify and manage risks related to contract delivery and suppliers.
PURCHASING MANAGER	<ul style="list-style-type: none"> • Identify and review current purchasing processes in relation to rebates. • Meet with the purchasing team and suppliers to understand challenges. • Analyze existing contracts for rebate terms and conditions. 	<ul style="list-style-type: none"> • Identify opportunities for improvement in the purchasing process. • Begin renegotiating contracts for better rebate terms. • Build long-term relationships with reliable vendors and suppliers. 	<ul style="list-style-type: none"> • Adjust procurement and rebate strategies based on feedback. • Develop a long-term vision for maximizing rebate opportunities. • Negotiate favorable terms to maximize rebates and achieve cost-saving targets.



30 DAYS

60 DAYS

90 DAYS

**ACCOUNTS RECEIVABLE/
ACCOUNTS PAYABLE**

- Familiarize yourself with invoicing, collections, and rebate processes.
- Ensure accurate monthly closing and reconciliation of balance sheets.
- Resolve queries by identifying root causes and implementing preventive solutions.

- Suggest improvements for accounts receivable/payable processes, ensuring compliance.
- Collaborate with cross-functional teams to streamline AR/AP operations and resolve issues.
- Prepare periodic reports to support management decisions and financial planning.

- Keep records updated, ensuring proper credit application and resolution of uncollectible amounts.
- Build and maintain strong commercial relationships to mitigate business impact.
- Implement process improvements through technology, automated workflows and enhanced policies.

**PRICING
MANAGER**

- Review the company's pricing strategy and how rebates fit into it.
- Meet with key stakeholders to understand their perspectives on pricing and rebates.
- Begin documenting any immediate areas for improvement.

- Perform market analysis to gauge demand, competition, and pricing opportunities.
- Analyze customer feedback to refine pricing strategies and address value or fairness issues.
- Propose changes to rebate structures or pricing models based on your analysis.

- Develop and implement rebate strategies aligned with pricing objectives and growth plans.
- Monitor the performance of rebate strategies to optimize revenue.
- Lead or support negotiations for major contracts to ensure competitive pricing and alignment with company goals.

**REBATE
MANAGER/
ADMINISTRATOR**

- Learn the ins and outs of the current rebate processes.
- Meet with stakeholders to gather their perspectives.
- Review active rebate agreements for compliance and performance.

- Address any issues with current rebate agreements and ways to improve.
- Work on improving the efficiency of rebate processing and tracking.
- Start developing better communication channels for rebate-related information.

- Provide training and resources for those involved in the rebate process.
- Develop a plan for ongoing optimization of rebate management practices.
- Process invoices, address billing queries and maintain accurate records.



Use this template as a starting point to develop your own 30-60-90-day plan for your rebate management heroes.

CHECKLIST: UNCOVERING THE SUPERPOWERS MISSING FROM YOUR CURRENT SQUAD

This checklist is designed to be filled out digitally as part of a skills gap analysis within your heroic rebate management team. By checking “Yes” or “No” for each skillset and specifying which role(s) already possess the required skills, you can easily identify areas where your team already wields these powers and areas that may need improvement or additional training. This structured approach helps in planning targeted development initiatives to enhance your superheroes’ overall effectiveness in managing rebates and keep the mission on track.

SKILLSET	YES	NO	IF YES, WHICH ROLE ALREADY EXISTS?
1. Does anyone have knowledge of rebate calculation methods and financial tracking?			
2. Is there knowledge of accounting practices related to rebates?			
3. Are they skilled in project management and cross-functional collaboration?			
4. Does the team have strong data analysis capabilities?			
5. Can they negotiate contracts, terms and pricing with suppliers to secure favorable outcomes?			
6. Is there proficiency in market analysis to inform rebate strategies?			
7. Are they confident in conflict resolution as it relates to disputed rebate payments, problem solving, and customer negotiations?			
8. Is there expertise in analyzing the profitability and risk of rebate agreements?			
9. Can they monitor financial metrics and report on financial performance?			
10. Can they assist with key periodic (month end close, quarter close, year-end etc.) business targets?			

IT'S TIME TO ASSEMBLE THE BEST REBATE MANAGEMENT TEAM

As the landscape of rebate management evolves with new challenges and opportunities, having a team of exceptional heroes is your greatest asset. They can anticipate market shifts, leverage new technologies, and negotiate more favorable terms, ensuring your rebate strategies remain competitive and aligned with your business goals.

Enable's comprehensive and collaborative rebate management software is your sidekick in this mission. It equips your team with the powerful tools and resources they need to shine in their roles while fostering a culture of teamwork and continuous improvement. With Enable, your rebate management heroes are not just ready for today's challenges but are also prepared to adapt and excel in the dynamic world of rebate management.

ONCE YOU HAVE YOUR SUPERHERO TEAM BUILT OUT, THEN IT'S TIME TO BUILD THE RIGHT REBATE PROGRAMS. [DOWNLOAD OUR EBOOK TO FIND OUT HOW.](#)





ABOUT ENABLE

Enable helps manufacturers, distributors, and retailers take control of their rebate programs and turn them into an engine for growth. Starting with finance and commercial teams, Enable helps you better manage rebate complexity with automated real-time data and insights, accurate forecasting and stronger cross-functional alignment. This lets you — and everyone in your business — know exactly where you are with rebates. Then you can extend Enable externally to suppliers and customers, setting them up with one collaborative place to author, agree upon, execute on, and track the progress of deals.

**FIND OUT MORE
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