



Tecnova's Presentation for American Society of Agronomy

India Opportunity Assessment

(End-user Interviews & Feasible Financial Assessment)

Oct 2013



End-User Interview – Key Objectives

15 Interviews conducted to understand need-gaps & suitability / response to ASA's offerings as below.

- Identify target sectors / companies or criteria for these
- Explore customer behavior & attitudes towards agriculture certifications
- Understand offerings from existing firms and need gaps therein
- Define key target segments – potential customers and ultimate beneficiaries
- Route to market – individual employees / associations, companies
- Understand customer preferences – skills needed, willingness to pay, mode of deliverance
- Platforms used to market and promote such offerings
- Follow-up support / aids expected from such propositions

Profile of Interviewees

Name	Organization	Designation	CCA Experience
Sanjay Naithani	Tata Chemicals	Deputy Manager (Technical Training)	CCA-2012
Dr. Shailendra	National Institute of Agricultural Marketing	Research Officer	None
Sandeep Shelke	Suminter India Organics	Executive-Sales and Marketing	CCA-2010
Dr. Gurmeet Singh Buttar	Punjab Agriculture University	Senior Agronomist-cum-Head	None
Dr. Upkar Singh Sadana	Punjab Agriculture University	Head of Department – Soil Sciences	None
Nagendra Rao	Nagarjuna Fertilisers	Head – Plant Nutrition Services	CCA-2011
Manohar N.	Nagarjuna Fertilisers	Agronomist	CCA-2011
Dr. Senthil Vinayagam	MANAGE	Director (Agril. Extn.) & Principal Coordinator, PGDAEM	None
Ajit Bhor	Reliance Foundation	Assistant Project Manager	CCA-2011
Vinay Prakash	Monsanto	Regional Business Manager	None
Kishloy Biswas	Rallis India	Manager- International Business	CCA -2010
Vinod Dalvi	Deepak Fertilizers	Manager – Marketing	CCA-2011
A K Dubey	Chambal Fertilizers	Senior Regional Manager	None
Dr A K Singh	National Fertilizers Limited	Manager (Marketing)	None
Dr. Anjani Kumar	Krishi Vigyan Kendra	Centre Coordinator	None



**KEY INSIGHTS FROM
DIRECT INTERVIEWS**



INSIGHTS

**– AGRI-EDUCATION AND
OPPORTUNITY FOR CCA**

Insights: Agri-Education in India

- Agriculture education in India is not appropriate to meet industry requirements; key concern areas
 - i. Changes of new technology and global developments are hardly covered
 - ii. Very little emphasis on sales and marketing; in the recent past - MBA Agri has brought in elements of marketing in agriculture which has been a welcome change
 - iii. Agri-extension is not aptly covered; even technical course curriculum are highly outdated with little relation to what is currently needed and offered to farmers.
 - iv. Quality of Agri-education varies significantly; few institutes offer good quality education while the others are below par and struggle with infrastructure & faculty
 - v. Practical aspects of doing a job is not adequately covered in degrees which mandates an orientation prior to on-the-job learning
- Agriculture is not able to attract bright students; for most agri-students their enrollment into BSc Agriculture is a compromise
- Foundation agriculture sufficiently covers the basic necessities of Indian farmers, although modern farming/specialized modules is yet to evolve

- **Very few institutes that impart good quality education in agriculture**
- **Even within these, course content is theoretical and not in-keeping with industry practices & changes**

There is unanimous agreement on lack of good-quality education imparted in the field of agriculture creating a need for corporate to be able to assess & hire right talent

Insights: Continuing Education in Agriculture Segment

- Given the lack of credible agri-education, on-the-job learning & industry interaction are considered the best way of assessing developments
- All players related to agri-industry have some form of activities for continuing education
 - i. Corporate Initiatives**
 - Most corporates organize induction programs for fresh graduates covering technical & managerial aspects
 - Individuals interested in updating knowledge access material on internet
 - Most companies offer occasional training internally on emerging topics such as pesticide/ organic farming etc. to meet employees' specific content needs
 - Most corporates have a library subscribing to research journals
 - Training at middle level management focusses more on managerial functions (leadership, motivation, time management etc.)
 - ii. Industry bodies** try to impart practical learning - Industry organizations like FAI organizes week long training (residential) on specific technical issues
 - iii. Educational Institutions** – certain universities offer training on specialized verticals like Organic Farming, Drip irrigation etc.

There is a palpable need for practical refresher courses as well as continuing education for agri-business professionals amongst corporates.

About CCA Program – Target Segment

Target Segment (What profile of individuals should be targeted for CCA programs)

- Frontline sales force – Regional/Area sales managers; usually spread across regions
- Individuals who are yet to enter the Industry and need to highlight additional skills so as to get recruited by agri-businesses
- University students or the potential job seekers
- Extension service employees of state governments
- Agri-professionals with 4-5 years of experience would prefer to go for an MBA rather than for a technical course like CCA
- Course can be effective for the co-operatives and private sector where immense support is given to continuous learning.
- Government employees may consider it an additional workload forced upon them by the company.
- Corporate Sector is the prime target for the course. Government sector is a difficult segment to crack with or without endorsement by government bodies.
- Could be added as an introductory program in the induction of new employees

Although students, government employees in agri-business and corporates in agri-business are all relevant target segments; it is the corporates that set the benchmark for knowledge & new standards and hence will be the segment that will appreciate the benefits of CCA as well as make it acceptable & established as an credible industry standard.



INSIGHTS

**– REACTION TO CCA & WAY
FORWARD**



Insights: CCA Concept & Acceptability

- Acceptability of course has to happen at the top management level
- Incorporation into the annual training needs approval from HR, it has to be top down
- The program, on the face of it looks like yet another correspondence course
- The need of the hour is on practical farm level solutions and imparting of such skills not in black and white.
- Promotion to individuals would not be effective unless the recruiter finds merit
- Fundamentals do not vary from country to country; advanced/specialized studies may vary from university to university
- A concept like CCA needs to be well marketed so as to create awareness. Such efforts need to be perseverant and across organizational levels
- Understandably, the strongest USP of the CCA program is the Continuing Education module particularly amongst middle level manager

CCA offers a unique concept of certification which is unlike anything that exists in the agri-industry in India, as is evident by the references made to CCA as a “course”. Clearly, the CCA concept finds merit with relevant stakeholders but needs to be marketed well to all stakeholders in order to explain the benefits and differentiation.

Insights: Perception on Need for Endorsements for CCA

- Endorsement by the government body would not make much difference. It is important whether the decision makers (marketing heads/HR) find the worth of it
- Endorsement/Public acceptance (in their recruitment process) by private sector would add to the demand for course.
- For private sector, an endorsement by a government body will not make much of difference, endorsements by industry associations would make a bigger impact
- Course needs to be marketed first to the government machinery (ministry), then to Corporate heads (CEO/GM).
- Government bodies like ICAR, Ministry of Agriculture and Department of Fertilizer need to endorse the program
- FAI (being the only training body for fertilizer sector) endorsement might bring credibility to the course
- Good-to-have some government body's commendation but not mandatory

There are varied opinions on benefits of endorsements for a CCA certification; however it is evident that role of private sector in enhancing approval of CCA is much greater than any government /industry endorsement or universities / educational institutions which maybe 'good-to-have' but not necessary; thus reemphasizing the need to market the CCA concept to corporates.

Feedback on CCA Program – Content & Relevance

- The content was highly technical; was theoretical and lacked in practicality
- The content made it relevant for scientist, teachers, research assistants and is not necessarily in tune with the industry requirements
- Should have different course material depending upon the level of experience of the candidates. Further, sections on specific issues should be incorporated (fertilizers/pesticides)
- Course material per se is nothing new, everything is covered in detail in degree courses.
- Value of course would be evident if it helps to convert the knowledge into wisdom (application of knowledge)
- The content of the course is not up to the mark and has direct extracts lifted from the internet. There are grammatical mistakes
- Up-dation of current market happening and technical knowledge is a core need of Agri-business professionals.
- Offers no practical training; to put a number, 80% of course content was academic.

The CCA reading material as well as the examination were considered as ‘refresher’ courses for academic purposes. Although the content was considered apt & suitable by most; it does not differentiate CCA from other courser / material etc. currently available.

Feedback on CCA Program – Fee Structuring

- Price is not the concern; the utility of the certificate is yet to be proven
- Pricing of Rs 9500 is not a major hindrance; training programs of FAI cost ~Rs15-20,000, but since it is conducted by industry body it is deemed effective.
- Highlighting the value for money to top management/ HR department is crucial
- Industry renowned personnel managing the program would bring credibility to the industry.
- Course fee is not high, but the course needs to be in the system
- Pricing of the course is quite reasonable; NFL employees are sent for FAI courses which costs around Rs15000.

The existing fee structure for CCA did not seem to be an area of concern or botheration for the corporates in general, especially when benchmarked with the existing spend on short-term refresher courses and trainings. However, the issue of 'value-for-money' was brought to light indicating the need for proper education on the importance of CCA.

Feedback on CCA Program – Impact Assessment

- Not a single attendee has written back to HR thanking for the nomination and expressing their happiness for having him sponsored.
- The benefits of the certificate is still unclear.
- For the CCA, it is an additional point on their resume.
- Getting access to knowledge material is not difficult; agri-business professionals need a platform to cross learn which could have been provided by CCA
- No visible difference in the productivity of the sales force
- Employers select best performers in the organization for the certification. Obviously they would be better performers than others.
- Have felt difference in knowledge and application of knowledge post CCA – Nagarjuna fertilizers
- My expectation from CCA was that there would be an opportunity to network with other industry personnel. This can be a forum for exchanging ideas - CCA Forum!
- CCA needs to include on-farm activities in Continuing Education. Agri-Education cannot be done on computer screen, best learning happens when one is interacting with others.

There is a lot to be desired from the awareness of CCA in India; there was a clear lack of understanding of what the certification can do as a meant of accreditation of professionals and also the value of being associated with such a certification.

Feedback on CCA Program - Continuing Education

Content

- Need to have trainings/conferences on specific issues in agriculture
- Training conducted on Drip irrigation (Jalgaon) was quoted as an example of being useful
- Course curriculum and continuing education need to be customized to ensure relevance across organizational levels – entry level sales officers to regional sales manager.
- Research journals and articles are too academic and would de-motivate industry personnel from taking up continuing education.

Delivery Format

- Online research material/exams are a better mode of reaching to people country-wide.
- Agri Education cannot be done online, learning happens by interactions

Logistics Structure

- 40 hours may be too long a requirement for some candidates in the wake of targets, travel etc. The time of 40 hours can be brought down to 20-25 hours
- Preferably such training should be conducted in every region as India is a large country
- Lack of time is a major concern. Usually do not have time for seminars/conferences.
- Renewal fees of Rs 1000 is miniscule, not a constraint at all
- Continuing education should be made voluntary. Not everyone in the organization would have the time to attend conferences and seminars

Continuing education though clearly the distinguishing feature of CCA needs to be better structured:

- **40 hours were deemed to be too high by many due to travel-related constraints**
- **Online sessions / webinars were considered to be an interesting way to excite people to get easy credits however should not be over-emphasized for the risk of getting too theoretical**

Feedback on CCA Program – Existing Implementation

- Candidates not receiving any mail/communications from ISAP/ASA on continuing education
- Expectation from CCA was to give a platform for CCAs to interact with each other which has not happened
- Communication of program structure was not clear, the aspect of continuing education was not intimated at the onset.
- Communication of results could be better - Candidates are only informed if they have passed or not.
- Significant difference between course enrollment and distribution of material
- There has not been a single meeting between Rallis HR and ISAP over the last 2 years; no presentation made
- Follow-up post exams are minimal. We are just told whether the candidate has passed or not. There is no follow-up on extent of incompetence, improvement areas, possibility of re-appearing etc.
- Continuing education has not been marketed to the end consumer; several CCA aren't even aware of the benefits of continuing education.

There seems to be discontent with the existing implementation of CCA program – with some desirable areas being:

- **Continuous follow-up and updates**
- **Platform / opportunities for interaction (continuing education forums)**
- **Elaboration of CCA structure, exam procedure & plan**



**FEASIBLE FINANCIAL
MODELS FOR ASA**

CCA – Fees Structure

The fees structure for CCA discussed with interviewees found positive acceptance and has been summarized below.

1. Examination fees – A fee of INR 9500 was found to be acceptable esp. when benchmarked with similar short-courses provided by institutions such as FAI
2. Renewal fees – Continuity education found readily acceptance with all respondents as an acceptable and much needed opportunity for enhancement of professionals in the field of agri-business. INR 1000 was found to be an acceptable fee however the benefit / value associated needs to be conveyed.

Key Attributes for the Success of CCA Certification

Given the inadequacy of practical exposure provided by agri-education in India, all interviewees appreciated and agreed on the opportunities that exist for CCA. However there was an evident lack of knowledge on what CCA offers –which needs to be communicated for the success of the certification.

- Differentiation of CCA – as **accreditation** of professionals' knowledge and difference from a 'course' / 'training' / 'program'
- Unique proposition of CCA – certification for professionals and **continual opportunities** to enhance knowledge and maintain accredited status
- Industry Interaction and Knowledge Update – Continuity education needs to be designed so as to appeal and attract the interest of agri-professionals such as
 - Online short-courses
 - Webinars on latest industry events / discussions
 - Seminars / events that are specific to topics (knowledge enhancing sessions)
 - Events that provide an opportunity for CCA professional to interact with each other
 - Marketing to corporates (HR / senior management / R&D team) who will act as the
 - Continual interactions with corporates to gather suggestions on CCA and provide feedback on CCA attendees from their organization

Corresponding Expenses

CCA clearly needs marketing efforts to support the education that is needed for creating acceptability. This may be done by hiring a [ASA representative](#) in India (without setting-up a legal entity).

Associated Expenses

- **Salary*** ~ \$ 30,000 - \$ 45,000 annual CTC
- **Incubation costs** (office space, payroll management, travel expenses, etc.) ~ \$2500 per person / month

Other Costs

- Travel expenses
- Course content customization
- Marketing material

*** Desired Profile of Personnel**

- Techno-commercial experience of 6-10 years / Account Management
- Knowledge and experience with agriculture related business
- Education – Agri-marketing / Graduation on Agriculture related courses