



POWER-MOTION TECHNOLOGY  
REPRESENTATIVES ASSOCIATION

# FOCUS

March 2003  
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## Why Come to PTRA in Tough Times?

by Duncan MacDonald, CPMR, PTRA President

In about one month we will be kicking off the 2003 PTRA conference in Hilton Head, South Carolina. I've talked to several reps that are questioning whether they can afford to make it this year when business remains slow and cash flow is stretched to make ends meet. I know it is a tough decision for some of you, but here are some reasons why I think it's a good investment, especially now:

1. There has been a noticeable trend lately where Allied membership is growing more

rapidly than Rep membership. These new Allied members are looking for reps in many territories. It could be that the one or two lines you need to bolster your business this year as well as to build your business for the future are waiting to meet you in Hilton Head.

2. Tough times require aggressive action and new ideas. This year's theme around building a business plan may be just the inspiration you need to think your way out of the current doldrums. In a

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**PTRA Conference**  
**April 2-5, 2003**  
**Growne**  
**Plaza Resort**  
**Hilton Head, SC**  
**REGISTER NOW!**

## Knowledge provides us tools to help us through the roughest business times!

by Jim Mabrey, CPMR, Chairman, PTRA Education Committee

We all have faced many challenges over the changing business climate of the past two years. Many of us have had to take our businesses through situations that we only heard about, but never actually had to maneuver through. Let's not forget that we have been in the worst industrial economic decline since 1970. Did you purchase

or consolidate with another agency? How many manufacturers have reevaluated individual representative territories? These are just a few of the issues you might have faced recently.

Situations are always subject to change. Running your business (either as a manufacturer or a manufacturers' represen-

tative) is not as simple as following a blue print to build a machine, too many dynamics in the economy enter into the process. You need a blue print to run your business, but you also need the knowledge to know how to adapt to changes and to strengthen your business design, just like updating the blueprint on the

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## LINE AVAILABLE!

### Maska Pulleys Inc.

180 Gagnon Blvd., Ste. Claire, Quebec G0R 2V0  
Ph 800/463-8928 Fx 418/883-2020 sales@maskapulleys.com

**Territories Open:** Northern California

**Product Description:** Cast iron components for V-belt and synchronous drives and belts.  
Sheaves, bushings, couplings, timing pulleys, HTD sprockets.

**Target Markets:** HVAC, Conveyor systems, Wood processing and Distributors.

## 2003 Slate of Nominees

**PTRA is always looking for volunteers! If you're interested in taking part in the decision making that drives PTRA, sign up for a committee position at the Conference! Sign up sheets with committee descriptions will be posted near the PTRA desk throughout the Conference. Get involved—you'll be glad you did!**

At the Annual Business Meetings, which will be conducted during the Conference in Hilton Head, April 2-5, one officer, the Secretary, and two Board members must be elected, along with the existing officers, who will be moving up in the chairs. Accordingly, Immediate Past President, Les Anderson, chairman of the Nominating Committee, submits the following slate of nominees for the open positions.

### President

**Robert Newman, CPMR, Industri/Motion, Inc., Downers Grove, IL**

### First Vice President

**Gregg Smith, CPMR, Smith Power Systems, Inc., Dallas, TX**

### Second Vice President

**Mark Tsatsos, CPMR, House of Motors, Inc., Golden Valley, MN**

### Treasurer

**Chris Brisbane, CPMR, Brisbane Industrial Drive Company, Jim Thorpe, PA**

### Secretary

**Joel Casaubon, CPMR, Canner Associates, Sturbridge, MA**

**Duncan MacDonald, CPMR, Engineered Industrial Products, Inc., Temecula, CA**  
*automatically becomes the Immediate Past President,  
serving a one-year term on the Board of Directors*

### The nominees for Director for three-year terms ending in the year 2006:

**Don Elfstrom, CPMR, Kacey Enterprises Inc., Winfield, IL**  
**Dale Hermanson, D.L. Hermanson & Associates, Tualatin, OR**

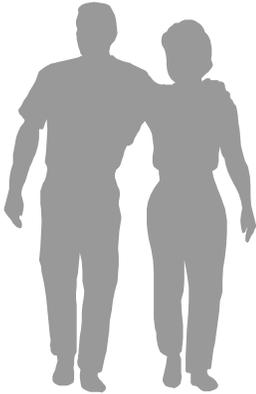
### The Allied members will re-elect as Chairman, for a one-year term:

**Sandy Tobias, Royersford Foundry & Machine Co., Royersford, PA**

### The Allied nominee for Director to serve a three-year term ending in the year 2006 is:

**Tim Lashinger, Riverhawk Co., New Hartford, NY**

## INFORMATIVE SPEAKERS, CHALLENGING TOPICS DRIVE 2003 PTR A CONFERENCE



Take a well-deserved break and sign up for an optional activity at the April 2-5 PTR A Conference! We've sample the best Hilton Head and Savannah have to offer—from golf and fishing to haunted Savannah tour with dinner. Join your friends and recharge your batteries—essential to maintaining that racing machine! And don't miss the fun of the raffle—buy your tickets on your registration form or at the conference. Next year's conference could be on PTR A if you win!

### PAUL PEASE

Leading the pack at PTR A's 2003 Conference is Paul Pease, giving the keynote address, *Winners Are Driven*, in addition to two workshops—for reps, *Building a Strong Principal Relationship* and for manufacturers, *Gaining a Rep's Mind-Share*.

Paul is the co-author with racing legend Bobby Unser of the forthcoming book of the same name. Pease is the author of two previous books, *Building a Small Blue Chip Business* and *Words to Action: Building a Leadership Legacy*. He has written thirty articles for national publications.

Pease owns a consulting and training business that emphasizes revenue growth. Clients include: Blue Shield of California, Rockwell Automation, Yaskawa Electric America, Journal Communications, Orthocad, Emerson Electric, Walters Wholesale Electric, Western Automation, and Hyatt Hotels. He taught *Market Plan Development* as an on-line instructor for the UCLA Business Extension and is currently teaching *Delivering the Best Customer Service* internationally on behalf of the Extension.

A 1977 graduate from Purdue University with a B.S. in Mechanical Engineering,

Pease transitioned from engineering to sales as a manufacturers representative in 1979. He sold and managed over \$75 million in automated motor control projects for electric vehicles; manufacturing aircraft such as the FA-18, C-17, and MD-80; machining the solid rocket boosters for the Space Shuttle; reducing electric power consumption in large buildings; and automating oil field production.

In 1991, Pease developed training programs for sales organizations that emphasized a big-picture business strategy for corporations. His long-term strategic growth programs have permanently raised the performance level of many corporations.

### WORKSHOPS

#### Building a Strong Principal Relationship

Led by Paul Pease, this program focuses on the things that can't be measured, but deliver to the bottom line because they are effective. Creating a Mutual Action Plan, how to communicate effectively with principals in terms they understand and respond to, and working as a team are the main aspects of this presentation.

#### Computer Software/ Rep Business Process Matrix

The purpose of the roundtable is to review a variety of automated solutions to the daily business requirements of a manufacturer's rep. Business processes and functions will be broken down. Software which assists with these processes will be reviewed. A mix of solutions from the basic 'off the shelf' to the highly customized will be discussed. The workshop will be led by PTR A member Colleen Daddario who spent 15 years in the corporate IT world, designing, developing, implementing and supporting computer software systems. These were primarily accounting and corporate business applications, residing on both mainframe and pc networks. Prior to that, she earned her degrees at the University of Akron and interned at NASA. Currently, she provides inside sales and computer support to the staff of Poklar Power Motion Inc., Wickliffe, OH.

#### Accounting, Succession & Budgeting

The title is clear and easy to understand—just as is Tom King's delivery style! Tom is a CPA with a wealth of information and knowledge of the rep function. Tom has appeared on other Conference programs—indeed his services are used by many rep associations in different industries—and we're fortunate

## INFORMATIVE SPEAKERS, CHALLENGING TOPICS . . .

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to have him back with us, especially during this time of year! You'll be able to meet one-on-one with Tom throughout the meeting, so bring your pertinent papers and questions and make your appointment when you register in Hilton Head!

### **Buying-Selling-Merging Rep Firms: Reps in Transition**

Bryan Shirley says the workshop will cover the three critical elements: value, structure of the deal, making it work. You'll look at examples and formulas for evaluation, compare the structures of "how" payments can be made, and then review the impacts to the "people" involved in these changes (customers, disty/dealers, principals, and employees). Learn how to find a deal and how to make it work!

Bryan Shirley is an active member in the ERA (Electronic Representatives Association) and also a member of MANA (Manufacturers Agents National Association). He is a second-generation manufac-

urers representative and leads the professional technical sales team of Colrud-Lowery, which is a result of Colrud Corporation's acquisition of LD Lowery in 2000. Bryan has been involved with three company acquisitions in the last 10 years. He graduated from Virginia Tech (Mechanical Engineering/Marketing Management), and was also a 1994 graduate of the Certified Professional Manufacturers Representative program. He is actively involved in consulting with other representatives Buy-Sell agreements, and he speaks to other associations and sales organizations on varied sales and management topics.

### **Sales Professionalism**

Frank Foster, Frank Foster and Associates Performance & Development Solutions, Toronto, ON, a consultant and trainer with MRERF's Certified Sales Professional (CSP) program, will be offering a sample of the program at our Conference. Frank specializes in helping organizations reach their objectives by working to develop training solutions. He is

a specialist in the consultative selling process and has worked with organizations in both Canada and the United States to maximize their potential and maximize results. Frank has over 25 years experience in sales and marketing in the North American marketplace. He has worked with colleges and universities, manufacturers, retailers, service companies, and associations developing and delivering performance improvement programs. He is able to combine his years of experience with current selling techniques to provide clients with custom solutions to solve today's most complex sales and marketing problems.

### **CPMR Program Review**

PTRA member and Education Committee Chairman Jim Mabrey, CPMR, Motion Control Systems/MCKC Inc., Kearney, MO, will be presenting his annual review and update of the Certified Professional Manufacturers Representative program—the designation growing in reputation and demand by manufacturers in many industries, including our own!

**AND MORE . . . Manufacturers interviewing for open territories . . . Peer networking . . . Free appointments with our Legal Counsel Mitchell Kramer and CPA Tom King . . . A variety of optional activities . . . A full spouse program . . . Friendship building experiences . . .**

## ALLIED MEMBERS: THIS PROGRAM'S FOR YOU!

Every race car driver has sponsors and supporters and we're taking care of ours' at this PTR A Conference!

Come prepared to discuss the issues of importance to you at the Allied Member Open Forum (you'll be asked to submit your topics/questions in advance, so please be sure to respond to facilitate the discussion)! Additionally, you'll enjoy and benefit from our keynote speaker, Paul Pease (see more about the topic and speaker on page 3). Then it's off to the workshops, designed just for you!

Bob Trinkle, a former manufacturer's rep, will be on hand for **Winners Learn the Right Stuff...About Outsourcing the Selling Function**. Bob's outline includes:

### The "Outsourcing" Phenomenon

- The core competency theory
- Having the right players
- Groups outside the box & outside the Corp politics
- Specialist but team players

### What's Being Taught About Reps

- The break even curve
- Time for selling
- Channels and Intermediaries
- Independence vs. interdependence

- Business people in sales
- The Strategic Decision to Use Reps

- Costs
- Hard and soft costs of a field sales force
- Off of your balance sheet and on to theirs
- Financing the cost of sales
- Control
- Communications
- Loyalty & partnering

### Looking for Power and Influence in the Marketplace

- Key account coverage
- Synergy plus leverage
- The customer's culture & market

### Getting the Most Out of the Relationship

- It's not magic ... it's interpersonal
- It works both ways

Bob Trinkle ("Trink") served as the third president of a large rep firm well known in the electronic component industry. In January of 2000, he sold his interest in that firm. During his career as a Manufacturers' Representative, Trink became active in the Electronic Representatives Association International. He served as an officer for his local chapter and later served eight years as a national officer including two years as National President and two years as its Chairman of the Board. He was ERA's interface with the Marketing Department of the Wharton School of the University of Pennsylvania who was one of

the first major "B" schools to undertake the de-tailed study of the manufacturers' representative function. Since selling his firm, he has been a featured speaker at trade association conferences, workshops and manufacturer's sales meetings. Trink has also served as a consultant to manufacturers concerning field sales issues as well as to representative firms on a variety of subjects. Additionally, Trink is working on a research project along with Dr. Erin Anderson concerning "outsourcing the selling function". Dr. Anderson is academia's foremost authority on the manufacturers' representative function and the two have worked together for nearly two decades. They plan on presenting their research in the form of a book to be published later this year. It will be the first book of its kind co-authored by an academic and a practitioner.

You've read about Paul Pease's qualifications on page 3 of this Focus. Come see what he can do to help you in **Gaining a Rep's Mind-share!** Representatives have multiple lines to sell. How does a principal ensure that they are getting their "fair share" of the representative's time and resources? This program will show Allies the effectiveness of the Mutual

Action Plan as a territory management tool, how to communicate with representatives in terms they understand, and how to be on a representative's mind without being in their face.



**Allied Members . . . Don't forget to take advantage of the opportunity to interview for open territories at PTR A's Conference. "Intent to Interview" forms were included in your PTR A Conference registration packet and must be completed and sent to PTR A by March 14!**

## Why Come to PTRA in Tough Times?

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period where we are fighting to build market share and where new business is scarce the elements of a good plan will be critical to your success.

3. As good as a program may be I've always found that the best ideas and value of being at PTRA comes from networking with other reps. There are reps who are growing their current principals' business and building their business even during the last couple of years. Net-

working has always been the best value of being a member of PTRA and its value is even higher during tough times.

4. Though our principals may understand a decision to not attend this year, they also are looking for new ideas and looking at their reps to see who's investing and incorporating creative new strategies into selling their products. PTRA is a perfect venue to meet with your principals and

keep them current on your best efforts.

5. PTRA conferences are fun and maybe that's just what we need a little of right now. I can think of many other reasons as well, but you get the point. Tough times are the best times to invest in ideas, relationships and mental energy. Please don't miss this opportunity this year.

### PLEASE NOTE:

PTRA'S TOLL-FREE PHONE NUMBER (888-REP-PTRA) IS STILL TEMPORARILY OUT OF SERVICE. THE NUMBER HAD BEEN LISTED UNDER THE PTRA'S PREVIOUS MANAGEMENT COMPANY AND WAS DISCONNECTED. LUCKILY THE NUMBER IS STILL AVAILABLE TO US, BUT WE MUST WADE THROUGH PAPERWORK REQUIRED BY TWO SEPARATE PHONE COMPANIES TO GET IT REINSTATED. WE ANTICIPATE THE NUMBER'S REACTIVATION SHORTLY AND WILL EMAIL NOTIFICATION WHEN IT HAPPENS! PLEASE CONTINUE USING 817/561-7272 UNTIL THEN. THANKS FOR YOUR PATIENCE!

## Knowledge provides us tools . . .

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machine design when something needs improvement. How many of our customers are producing equipment today with the same blueprints and tools as 15 to 20 years ago? Are you still running your business the same as 15 to 20 years ago?

We on the PTRA Education Committee provide you the tools to sharpen your business skills. Our best resource for this is MRERF. The Manufacturers Representatives Educational Research Foundation is a non-profit organization dedicated to enhancing public awareness of the value of the independent multiple-line selling organization and to providing professional education for the representative community.

The MRERF Education Program provides educational op-

portunities for representatives, brokers and agents through certification, sales training, and continuing education programs. The Foundation also prepares educational materials, and publishes resource material and periodic reports concerning the representative function. All information generated by MRERF is available to both the academic and business communities.

The formal educational programs for representatives offered through MRERF and its educational subsidiary, the Institute for Professional Advancement include: CPMR Certification, an executive education aimed at the owners, managers, or heirs of representative, broker and agency firms and Skills for

Sales Success, which is for sales people within a firm. It covers self-management skills as well as tactical and strategic selling skills, and leads to CSP (Certified Sales Professional) certification.

For manufacturers, MRERF offers Managing the Manufacturers' Representative Network. This course is designed for educating your managers that interface directly with manufacturers' representative

Knowing what your options are in running your business, gives you the edge to survive in the current economic times.

I am looking forward to seeing you all at Hilton Head in April.

## MRERF, IPA, CPMR, CSP, MANA, and PTRAF – What's in the Alphabet Soup?

by Duncan MacDonald, CPMR, PTRAF President

The MRERF Trustees meeting in January this year was a mixed bag of good news and great progress with bad news and tough challenges ahead. Before getting down to that I wanted to take a minute to review what all the relevant acronyms actually stand for.

PTRAF has official and unofficial associations with a variety of other non-profit entities that have specific goals and missions different, but supportive of our own. PTRAF is one of 30+ rep associations that sponsor MRERF (Manufacturers' Representatives Educational Research Foundation). MRERF in turn owns IPA (Institute for Professional Advancement) which sponsors three rep oriented training programs, *CPMR* (Certified Professional Manufacturers Representative) for rep owners and managers, the *Skills for Sales Success* program for rep sales people, which can lead to a CSP (Certified Sales Professional) designation, and the *New Directions in Inside Sales* video training program. Separate from IPA, MRERF also sponsors the *Managing Your Manufacturers Representative Network*

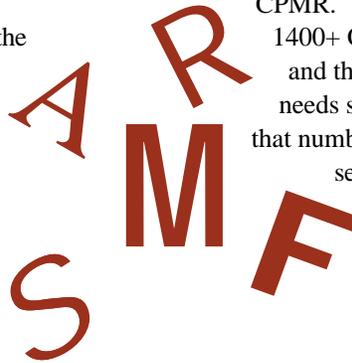
training program for national and regional sales managers using or thinking of using manufacturers reps.

MANA (Manufacturers Agents National Association) is unaffiliated with PTRAF, but is supportive of our mission as we are of theirs. MANA publishes *Agency Sales* magazine, helps reps find principals and vice versa, works to provide insurance and other services for reps as a group, promotes the rep function nationally and internationally, and does some lobbying. MANA is also the largest of the rep associations sponsoring MRERF. OK, now you're an expert on how to put letters together.

In addition to its education for reps and principals initiatives MRERF also works hard to promote the rep function and support research at the university level. There has been great success in the past few years with universities in Missouri, Ohio, California, Maryland, Arizona, and Indiana

participating in research on the rep function and incorporating sessions on the rep function in their business curriculum. MRERF has also produced a Powerpoint presentation that you can use at your own alma mater or local college to present the rep function to a business class. If you can do this Susannah Hart at MRERF would love to hear from you.

MRERF is facing a big challenge now filling all the seats in the training programs, including CPMR. There are 1400+ CPMR's now and the program needs several times that number to have a self-sustaining budget. MRERF plans to build to a \$1 MM budget by 2005 to adequately fund research and to further promote the rep function. The value of MRERF's efforts to all of us cannot be understated. Investing in their success through participating in the training programs or even direct donations will produce real dividends and opportunities for your firm.



## Members' News

**Don Elfstrom** of **Kacey Enterprises, Inc.**, Winfield, IL reports the firm is extremely pleased to announce a new addition to their sales team, **Mr. Gary Smalley**. Gary brings ten years of PT distributor sales experience in the state of Iowa. His territory responsibilities are the state of Iowa, western Illinois, and western Wisconsin.

**Foxco Equipment Sales Inc.** of Placentia, CA is proud to announce they were recently awarded by Marathon Electric two sales growth awards, #1 in New Account Sales in 2002 and #1 in Growth in 2002. Foxco employs five outside sales engineers and covers the states of California, Nevada and Arizona. **Todd Fox** says more details can be found at their website, [www.foxcoequipment.com](http://www.foxcoequipment.com).

**Frank Flemming** of **Ogura Industrial Corp.** in Somerset, NJ, reports that on January 2 **Yohei Tsuji** joined the company. Yohei graduated from

Michigan State this past year and has a Bachelor of Science degree in Product Engineering, which is a mix of both the strengths of mechanical engineering and product design. Yohei came to the U.S. from Japan when he was eight years old, so he has lived most of his life in the U.S. Since he kept up with his Japanese language courses through high school, he is completely fluent in both English and Japanese. Prior to joining Ogura, Yohei worked for an automotive company in Detroit and had exposure to both product engineering and sales engineering. Yohei's responsibility will be application, engineering and technical support for our field sales reps. Yohei will support Ogura's reps with both inside support and customer visits.

**Correction:** In the previous edition of *Focus* we incorrectly reported the number of branch offices for **Hilco, Inc.**, Alpharetta, GA, as 22. The number of sales offices is 11. Our apologies for the typo and any resulting confusion!

### Welcome New Members

#### ALLIEDS

**Dings Company**  
Milwaukee, WI

**Overly Hantz Motor Base Co.**  
Lebanon, OH

**Tollok North America, Inc.**  
Auburn, GA

### Calendar of Upcoming Events

#### 2003

*April 2-5*  
**PTRA Conference**  
**Crowne Plaza Resort**  
**Hilton Head, SC**

*August 10-14*  
CPMR Coursework  
Indiana University

*October 16-18*  
PTDA Annual Convention  
New Orleans Marriott  
New Orleans, LA

PTRA welcomes any opportunity to assist your promotion of your firm! To have your firm's news included in the next Focus, please use the enclosed Quick Report Form. Send it to PTR A before April 30!

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