



POWER-MOTION TECHNOLOGY  
REPRESENTATIVES ASSOCIATION

# FOCUS

## Survey Says.... ???

by Bob Newman, CPMR, Industri-Motion, Inc., Downers Grove, IL, PTRA President

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### Please Note:

2003-2004 dues invoices have just been mailed. Please take note of the final due date of August 31. You don't want to miss out on what benefits your membership can bring for the coming year!

We'd like to think we know everything, and can focus our efforts consistently on the most important matters, but there are always unanswered questions. The PTRA Executive Committee and the Board of Directors, as stewards of our Association, spends time at Board meetings discussing the ongoing matters of PTRA. But the

fact is, what we discuss and decide is only as good as the information we have to work from. Just as in any other business decision, if there's more input and data available, it's possible to make better, sounder decisions.

Six years ago, PTRA commissioned a survey of members needs – both actives and allied. The results of

this survey were reviewed by the Board and then presented to the membership during our Conference in Monterey, CA in 1999. The purpose of the survey was to accomplish the following:

- o Help direct new Association activities
- o Increase and expand the mission performance of PTRA

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## www.ptra.org Update

by Bob Lennon, CPMR, T.P. Lennon Company, Inc., Elburn, IL, Communication Committee Chair

What a great conference we just had at Hilton Head... The speakers were right on the money with their topics, the sessions were well planned, committee meetings were productive, and the legal and accounting discussions alone more than justified the cost of the stay. Attendance was exceptional considering the tough environment we are all faced with now, and many thanks to our "first-timers" who provided a big boost to the group as a whole. My thanks to all those who made it such a successful meeting.

I want to thank

Donna Frendt of Creative Cyberservices, our website developer, for taking the time and expense to join us again. I hope many of you took the time to talk with Donna about how her service can enhance your business image. Jay Holder has graciously agreed to join me on the Communication Committee this year, and Jay, Donna, and I had several chances to discuss what we hope to do with the PTRA website in the coming months. We have recently completed a rather thorough review of the site content, and feel comfortable that the con-

tent is much more pertinent and up-to-date at this point. We still have some work to do with the online forms, making them current and consistent. Guests will soon have the opportunity to choose between completing these forms online and submitting via the site, or downloading/printing/faxing the forms. We are also looking at PowerPoint Presentations available thru MRERF to post on the site. These would allow a visitor who is unfamiliar with our function to get a brief, yet accurate,

*Continued back page*



## PTRA's 2003 Conference, "Winners Are Driven", Finishes First Place!

That's right, the race is over, and the 115 members who attended the 2003 Conference on Hilton Head Island, South Carolina, truly did take the victory flag! Friendships and business partnerships were forged and enhanced and members took home a plethora of valuable information and experiences to help make their businesses more successful. The free interview sessions with PTR A Legal Counsel Mitchell Kramer and CPA Tom King were enthusiastically received and, in several instances, paid for the cost of attendance for a member. The social events at the Conference were also very well attended and enjoyed by all.

A great meeting like this is a result of the hard work of many people. We'd like to offer our sincerest thanks to: **Conference Chair Don Elfstrom** and his Committee for everything; **Hostess Chair Ginna MacDonald** and her Committee for the warm welcome and thoughtful gifts; **Immediate Past President Les Anderson** for his enjoyable and informative "New Members, First Timers" presentation; **Golf Chair Jim Steiner** for arranging a fun and memorable event for our tourney participants; **Run/Walk-a-thon Chair Robin Tetrault** for getting up so early morning after morning and creating a fun time for all who participated; and the **PTRA Executive Committee, President Duncan MacDonald, 1<sup>st</sup> VP Bob Newman, 2<sup>nd</sup> VP Gregg Smith, Treasurer Mark Tsatsos, Secretary Chris Brisbane, and Allied Director Sandy Tobias** for handling a myriad of duties during the Conference! If we've forgotten anyone integral to the success of this Conference, our sincere apologies! Well, we can hear the engines roaring. It's time to get back out to the racetrack to start planning PTR A's next winning Conference! (That is, just as soon as we finish our glass of cold victory milk!)

## Raising the Bar

by Mike Simpson, SKA Simpson & Associates, Inc., Birmingham, AL, Education Committee Chair

Everyone of us who are Members and Allied Members of PTR A are clearly interested in some form of "raising the bar" of professionalism among our ranks. One obvious way is to participate in some form of formal continuing education.

Among the most proven and powerful forms of continuing our education both from the Representative side as well as from the Principal side, has been CPMR and the other programs offered by the folks at Institute for Professional Advancement.

We all look for ways to differentiate ourselves and our Company from the rest of the world. To that end, insuring the continued success of

these programs being a part of the standard should be important to each of us.

Your Education Committee is working this year to help you refocus your attention to a method of helping this valued and proven method of achieving these goals, the Lynn Mattis Fund. It is true that there are many demands made of our resources, however, this request for your attention and support will insure that some of these values continue to become more a part of our culture as professionals.

For those who have not had the story of this fund explained to you, Lynn Mattis was a top drawer Manufacturers Representative who himself believed in keeping himself

current in the areas of managing a business. He also believed in helping his co workers and associates to grow in the business through continuing education. This fund is named in his honor and seeks to continue his tradition of "raising the bar".

The opportunity for someone in our ranks to receive the benefits of continuing their education through The Lynn Mattis Fund has proven it's worth and we ask the each member agency and allied consider some form of financial support of the fund.

You can make your contribution simply by mailing your check to PTR A specifying LYNN MATTIS FUND.

Thanks!



## CONGRATS TO 2003 Lynn Mattis Scholarship Recipient!

At a drawing from the names of all CPMR Candidates conducted at the PTR A Conference, we pleased to announce awarding of the 2003 Lynn Mattis Scholarship to:

**Robin Tetrault**  
Summit Agencies Ltd.  
Calgary, AB, Canada

Past award recipients include:

2002  
**G. Bryce Manthorne**  
Power Component  
Sales Co., Pottstown,  
PA

2001  
**Bill Brant**  
Gleeson &  
Associates, Overland  
Park, KS

2000  
**Steve Alderson**  
Alderson Industrial  
Sales, St. Louis, MO

## Survey Says . . . *Continued from page 1*



You can contact PTRA Legal Counsel Mitchell Kramer, Kramer & Kramer, LLP, at his new email address, [mkramer@kramerandkramer.com](mailto:mkramer@kramerandkramer.com), or by phone at 215/887-9030.

- o Define and enhance the value of PTRA membership to both its long-term and new Active members
- o Define and enhance the value of PTRA to its Allied members
- o Measure performance and help justify future budgets
- o Help formulate a communication strategy for prospective, long-term and new Active and Allied members

In short, the leadership of PTRA at that time rightly concluded it was necessary to ascertain members opinions on a variety of topics to provide a platform with which the Board could make decisions on behalf of the PTRA membership in the coming years.

I won't go into a lot of detail regarding the prior survey, but it was wide ranging. Some of the areas covered were:

- o Surveying member's attitudes toward PTRA
- o What programs were of interest; which lacked support
- o Conference issues regarding format and content
- o Profile information as to size and structure of member firms
- o Profile information about firm management

The entire survey was summarized and was well received by the membership. If you want to reacquaint yourself with it, the survey and its results are

posted in their entirety on our website – [www.ptra.org](http://www.ptra.org)

Additionally, Conference attendees have been asked, almost every year, to complete a Post-Conference Survey. This provides the Board with input as to facets of the recent Conference structure and content, as well as information for planning future Conferences.

Although we've surveyed Conference attendees, some members don't attend every year (for various reasons) and some members never or, at best, very infrequently attend a PTRA Conference. We've never targeted a survey to the infrequent (or never attended!) PTRA member.

The Member's Needs survey is now 5 years old. A lot has changed in the world and in our businesses in the last 5 years; as Duncan MacDonald expressed it so well "the cheese seems to be moving around a lot".

During our post-Conference Board meeting at Hilton Head, though remaining highly relevant, we recognized that our information needs to be updated, and perhaps expanded. So much has changed that it's time to take another look. Additionally, the Board wants to capture the input from those members who may not attend Conferences – we want to know what programs and issues can be presented so that PTRA and our Conferences provide value to the widest possible section of members and prospective members. At our

Board meeting, we asked our Rep-Principal Relationship committee to work with our Communication committee to resurvey members. Rather than working with an external market research company as had been done previously, and due to the expertise of our webmaster, Donna Frenndt, these two committees, along with Donna, have been developing the surveys and will compile the data for Board and membership review.

In the coming weeks, members of both active and allied firms will be receiving both a Members Needs survey as well as a Conference survey. The surveys will come to you via email and you'll be able to respond via email. Those without email will receive a hard copy for response via the mail.

On behalf of the Board of PTRA, I ask that you take the 15 or so minutes it will take to complete the surveys and to get your responses back to us. We need to have the data compiled by mid-August for our mid-year Executive Committee meeting. As anyone who has been on the Board or Executive Committee over the last 5 years can tell you, all of this information is highly valuable to the Officers and Directors of PTRA in working on everyone's behalf to make PTRA the best it can be. Thank you for your support!

## CPMR Translates Well Into Any Language

If Michael Tobin was looking for training and education to assist him in his career as an independent manufacturers representative, the German rep maintains he found just what he was looking for after completing the first year of the three-year MRERF CPMR program.

Tobin, who works for W. Hinderer GmbH, a leading German agency in the paper industry, notes that one of the major benefits of his CPMR experience is that it provides a unique opportunity to take a step back from all you're involved in during the course of daily business and allows you to gain a view of the big picture. "I found the course material to be especially applicable to our industry," he says. "Although we may see some matters differently, it is useful to hear and understand another view and more importantly to understand the cause and effect of globalization in our business and in world economics."

MRERF's Certified Professional Manufacturers Representative (CPMR) program was developed to provide executive education for owners and managers of professional field sales organizations. The program involves residence on a college campus—Indiana University and Arizona State University—one week a year for three years, taking courses designed for the rep firm owner; passing an exam each year at the end of the year's session (level 101, 201,301); and cre-

ating a business and strategic plan for your firm.

### *An Ideal Learning Tool*

The German rep maintains that "relevant" and "interesting" are the two words that held true to form during his one-week stay at Arizona State University earlier this year. "At the beginning, I was a little skeptical concerning the course's worth to me, but after completing the week, I found it to be relevant, valuable and interesting. Now, comes the hard part—taking and making time to move forward what I've learned to truly see what I gained from the process.

### *The Value of Thorough Planning*

Tobin continues that he found the organization of the course to be excellent. "I know how much planning, care and work goes into running such a program. The efforts taken to make things go right were very evident—right down to planning and sticking to a timetable so regular breaks were scheduled to re-charge the batteries and facilitate students' concentration. Equally important was the quality of the faculty conducting the classes."

When it comes to considering differences/similarities in the reps' work here and abroad, Tobin notes that "I found the subject material to be equally applicable—in principle—to our industry and to other European markets. While legal matters

may vary in detail, the principles remain similar."

He continues that, "the general marketing, accounting and sales elements covered apply equally to reps and manufacturers' salesmen and across industries, although with a natural United States' orientation."

### *True Benefit Resides in Using Information*

Tobin admits that he walked away from his first year of CPMR with enough satisfaction that he plans on coming back for more. "I have every intention to return for the next two years. It's clear to me that the week's stay for CPMR presents only the tip of the iceberg. The real benefit of CPMR can be seen only by using the information gained to more efficiently run your business. I know only too well how easy it is to get caught up in daily business and to not continue your personal education and development. I think that the opportunity to take a guided and structured look at the business, develop a plan, consciously develop your company culture, analyze the bottom line, etc., are opportunities not to be missed."

*For more information on the CPMR program or an application for the next session, go to MRERF's website, [www.mrerf.org](http://www.mrerf.org) or call 800/346-7373!*

Successfully completing their three-year course of study and final examination to earn their designation, Certified Professional Manufacturers Representative, the following PTR A members are to be congratulated!

**Bill Brant**  
**J.F. Gleeson and Associates, Inc.**  
**Overland Park, KS**

**Greg Matthews**  
**Keller Industrial Products, Inc.**  
**Clarence NY**

**Joey Moor**  
**Robco, Inc.**  
**Carrollton, TX**

**John Slawinski**  
**J.S. Inc.**  
**Birmingham, AL**



## Do You Have Our Number?

PTRA has changed our toll-free phone number to **888-817-PTRA**



(7872). Please make note of the number and feel free to give us a call at any time with your comments, questions, or updates! We look forward to talking to you!

## Board and Committee Positions Filled at Annual Conference

At the annual meeting of the PTRA membership held at the Conference in early April, the membership elected the 2003-2004 Board of Directors.

Leaving the Board with the members' appreciation for their many contributions were Immediate Past President **Les Anderson**, L.J. Anderson & Associates, Minneapolis, MN and **Bob Lennon**, CPMR, T. P. Lennon Co., Inc., Elburn, IL.

Elected to the Executive Committee were **Robert Newman**, CPMR, Industri/Motion, Inc., Downers Grove, IL as President; **Gregg Smith**, CPMR, Smith Power Systems, Inc., Dallas, TX, as First Vice President; **Mark Tsatsos**, CPMR, House of Motors, Inc., Golden Valley, MN as Second Vice President; **Chris Brisbane**, CPMR, Brisbane Industrial Drive Company, Jim Thorpe, PA as Treasurer; **Joel Casaubon**, CPMR, Canner

Associates, Sturbridge, MA as Secretary, and **Duncan MacDonald**, CPMR, Engineered Industrial Products, Inc., Temecula, CA as Immediate Past President. **Sandy Tobias**, Royersford Foundry & Machine Co., Royersford, PA will continue on the Committee in her position on the Board as Allied Chair.

Joining the Board are **Don Elfstrom**, CPMR, Kacey Enterprises Inc., Winfield, IL and **Dale Hermanson**, D.L. Hermanson & Associates, Tualatin, OR as Rep Directors and **Tim Lashinger**, Riverhawk Co., New Hartford, NY as Allied Director.

Continuing in their positions are **Tom Calvario**, CPMR, Mahx F. Linster Inc., Alpharetta, GA; **Ron Haynes**, CPMR, Robco Inc., Carrollton, TX; **Jay Holder**, CPMR, N.O. Holder & Associates, Greenville, SC; **Bryce Manthorne**, CPMR, Power Component Sales Co., Pottstown, PA; and **Ted**

**Blaszak**, Peerless-Winsmith Inc., Springville, NY, Allied Director.

Others who have graciously volunteered their time to work on behalf of the association are our Committees! **Kevin Springstead**, CPMR and **Ted Blaszak** will be leading the Rep/Principal Relations Committee; **Jim Mabrey**, CPMR is our 2004 Conference Chairman, ably assisted by 2005 Conference Chairman **Tom Daddario**, CPMR; **Jerry Rhodes** will be chairing the Membership Committee with **Sandy Tobias** as his Allied Co-Chair and multiple committee members covering the myriad of details; **Mike Simpson** is heading up the Education Committee; and, finally, **Bob Lennon**, CPMR is continuing as chair of the Communications Committee!

It takes a whole village to lead an association—feel free to add yourself to the community! And our thanks to all our volunteers!

## PTRA Mission Statement

The POWER-MOTION TECHNOLOGY REPRESENTATIVES ASSOCIATION (PTRA) is an Association of independent manufacturers' representatives and manufacturers dedicated to promoting the sales representation (rep) function in the power transmission and motion control industries. PTRA will strive to offer all members opportunities for education, information exchange, networking with other reps and manufacturers, plus an array of quality services designed to improve career performance and professional stature.

## Members' News

**Kennedy Industrial Sales**, Fairfield, CT is pleased to announce the addition of PhyMet, Inc. to their line of power transmission products. PhyMet manufactures a proprietary line of solid lubricants. The lubricant is a mixture of polymers, oils and other additives that can be customized for specific lubrication requirements. Kennedy Industrial Sales covers the New England states as well as northern New Jersey and Long Island, NY.



**Robert Hughes of R. J. Hughes Sales, Inc.**, based in Burr Ridge, IL, is proud to announce the appointment of **John Adrian** to the position of Territory Sales Manager. John has spent 18 years in the bearing and power transmission industry, previously with SKF as regional accounts manager for both OEM and distributor sales.

Additionally, **R.J. Hughes Sales** is excited to announce its recent agreement with **Transcom, Inc.** In addition to sales responsibility, R.J. Hughes Sales will be stocking the Code Blue Program of inch and metric seals in Burr Ridge, IL. R.J. Hughes Sales will be responsible for all distributor sales in IL, IA, and IN.



**Anthony Leone** recently joined **Ogura Industrial** as a customer support representative. In addition to assisting inside sales support for mobile applications, he will be involved in technical support,

warranty claims and application engineering. Anthony has over 20 years of electrical related experience and a good knowledge of power transmission drive components. Prior to coming to Ogura he was an electrical specialist for Motion Industries. Some of his other work experience has included designing and building the controls used in tubing manufacturing and field service for induction heating equipment. He received his electronics training in the Air Force, where he was a flight simulator technician. He has worked on and flown the C-141 transport in NJ and the F-111F while stationed in England. He also worked on the Boeing 747, 727 and 737 flight simulators as a civilian.

### IN MEMORY

Sadly, we must pass along the news of the death of **Donna Brisbane** who passed away after a lengthy battle with cancer in early April. Our sympathies go out to her family and everyone at **Brisbane Industrial Drive Company**, Jim Thorpe, PA.

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 PTRA before August 15!

**www Update. . .***Continued from page 1*

tutorial on the rep agency's role. Member surveys are also on our list of "things to do". As we already have the database of members email addresses, we can quickly poll the membership, gaining timely insight on trends and opinions. The Executive Committee can also use this function to update the Strategic Plan of the Association, assuring we are on the right track for the future.

I want to remind everyone again to assure that you keep Headquarters posted of any changes within your organization. The website can be updated immediately to reflect things like new area codes, email address changes, or website additions. Also keep in mind the enhanced listing program, which can put a brief statement about your organizational strengths on the Locator.

There is no denying that the internet has become such an important media in how business is conducted today. I am lucky that we have such a great resource built for us all, and fortunate that it has developed into a tool which has drastically lowered several budget items for the Association. Who ever guessed a website could save you money ?? The most important thing to remember, is that it is your website. As always, I appreciate comments and suggestions. Please send them to my attention at bob@tplennoncompany.com.

**Welcome  
New  
Members****ALLIED**

**GMN Bearing, USA, Ltd.**  
*Stanley Cromer  
Houston, TX*

**Calendar of  
Upcoming  
Events****2003**

**August 10-14**  
CPMR Coursework  
Indiana University

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

**2004**

**January 11-15**  
CPMR Coursework  
Arizona State University

**April 28-May 1**  
**PTRA Conference**  
Hilton Waterfront  
Beach Resort  
Huntington Beach, CA

**Copies of  
Winners Are Driven**  
by Bobby Unser,  
co-authored by PTR A  
Conference speaker,  
Paul Pease, are still  
available from the PTR A  
office at \$24.00.  
Price includes shipping.  
If interested in  
purchasing a copy, call  
or email PTR A and we'll  
get the book in the mail  
to you!

*The PTR A FOCUS  
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of the*

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**WE'RE ON THE  
WEB!  
WWW.PTRA.ORG**

**2003-2004  
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