



FOCUS

A publication of the Power-Motion Technology Representatives Association (PTR A)

December 2007
Volume 6, Issue 3

Inside This Issue:

- Wanted: New Members . . . 2
- Members' News 3
- New PTR A Members 3
- Working to Improve Your
Networking Experience . . . 4
- Home Office Deductions . . 4
- Breast Cancer Benefit . . . 5
- 2008 PTR A Conference
Schedule at a Glance 5
- Calendar of Events 6
- Code of Ethics 6

President's Perspective

by Joel Casaubon, PTR A President

I would like to take this opportunity to address an issue that has become near and dear to my heart, and I suspect this is an issue with many of us these days of electronic communications. That issue is e-mail etiquette, or as I like to call it "**netiquette.**"

The Internet has brought a whole new meaning to the way we communicate with each other. In a way it is a wonderful thing, because it has made it extremely easy and inexpensive for us to communicate with our customers, our principals and our suppliers. The days of the "speed memo" are gone, and I for one do not miss those. However, I would like to say that e-mail has also brought about its own set of problems such as spam, viruses and an easy way of passing along bad news. This in turn actually increases the amount of time we spend each day going through our inbox. How many times have you heard someone say "When I logged on today, I had 137 e-mails in my inbox"?

I would like to share with you what I think are some of the key issues that we should all be aware of when we use this valuable tool. If we all take a few minutes to understand what is going on and to try and follow some of these simple rules, life will be so much simpler and our use of this tool will become more efficient. Remember, time is money, and the value of our time continues to increase every year.

Following is a list of e-mail issues we all should be constantly aware of:

• **Subject** — The Subject should be stated clearly and accurately. Many of us file

messages in folders for later reference, but if the subject is incorrect, vague or imprecise, it makes it very difficult to retrieve the message at a later date.



Joel Casaubon

• **Reply to All** — We should not reply to everyone on a message unless it is information that everyone really needs to have. Take the time to go through the list of "Cc"s and delete anyone that doesn't need to see your reply.

• **Forward** — This is one that really gets to me because when you deal with large companies, you end up getting an e-mail that has been forwarded several times by numerous people on the "Cc" list. By the time you scroll down through every copy of each forwarded message, you find out that it is a message that you have already read three times. Also, every time you "Reply to All," you are passing along everyone's e-mail address to a host of people that may not even know who you are.

• **Signature** — Along with the forward function is the Signature function. Since when does a "signature" include the "wisdom of the day"? I must say that there are times when I am scrolling down through a forwarded e-mail that it takes me some time to find my way to the actual message. I can appreciate that it is cute to tell everyone to "have a nice day," but please limit your

special comments in your signature box to a minimum so that I can scroll past them faster and get to the meat of the Replied/Forwarded message.

Also, I would like to suggest that you be concise and to the point. Use proper spelling and grammar (use a spell checker). Do not overuse the "High Priority" option, and DO NOT forward chain letters.

- **Lastly** — whatever happened to picking up the phone and calling someone? With one-rate phone service it really doesn't cost any more. I remember hearing that "selling is a people business," and "People buy from people." Well, if that is truly the case, then people still like to talk to people too. Make it personal. Instead of sending an e-mail to tell someone their order is late or they

screwed up, why don't you call them? Sure, send them a message as confirmation, but wouldn't you rather hear it personally than in an impersonal e-mail message? I know I would. Besides, that way you can be certain they got the message and understood it. Go ahead, give it a try.

I think everyone should take a class in e-mail etiquette or at the very least, spend some time trying to better understand what makes sense and what doesn't. Think about it next time you get an e-mail and there is something about it that bothers you. If we were to all take these suggestions under advisement, I really think we could make a difference.

Help me clean out my Inbox. Think about the next e-mail you send. ▲

WANTED: New Members **REWARD: Free '08 Dues!**

by Walt Brooks, Membership Chairman

Ask any PTRAs member and I am sure they will agree that in addition to doing a great conference each year, membership most definitely has its privileges. The benefits of membership and the networking that our conference affords each of us is second to none and is most definitely worth the price of admission which at this point is a true bargain. Think of how much more we could do for you as an association if we were larger.

We are asking you to help us grow our ranks and plan to reward those who "get the sale" on the recruitment of new members. Here's the deal:

Get a fellow rep or a principal to join PTRAs and attend the 2008 conference and your dues for the following year will be **FREE!** Here's how it works:

- When you get the commitment from the rep or manufacturer that wants to join, have them fill out and submit the application form downloaded from the PTRAs web site at www.ptra.org. Make sure they list you as the sponsor, then either call or e-mail PTRAs letting us know the name of the new member.
- Once we've confirmed that they have joined and registered for the 2008 conference, we'll send you a thank you and what we won't send you is an invoice for next year's \$350 dues!

Good luck and good selling! ▲



Walt Brooks

Member News

Welcome New PTRA Members

Principal Members:

Jack Krug
Power Drive
Michigan City, IN
(606) 564-6100

Mark Taylor
Richards-Wilcox
Aurora, IL
(630) 264-4500

Representative Members:

Anthony F. Bahowick
Bahowick Sales, Inc.
Saint Charles, IL
(630) 377-9704

Engineered Industrial Products, Inc. (EIP) is pleased to announce the opening of a new warehouse and office in Tualatan, Oregon, and the addition of Brent Moldenhauer as a territory manager working out of Spokane, Washington. Moldenhauer comes to EIP with several years experience in the bearing industry and a thorough knowledge of the Pacific North West.

EIP provides sales, marketing, customer service, warehousing and assembly services to manufacturers who work with OEMs and distributors throughout the western United States. For more information visit their web site at www.eip-inc.com.

Bill Dabney passed away July 17, 2007. Bill, along with Howard Snyder, founded **Robco Incorporated** in Dallas, Texas in 1959. Bill served as president of PTRA from 1978 to 1979 and remained an active member after his retirement in 1991.

Homer Rodden was honored by Robco Inc. in recognition of his 40th anniversary with the company. Rodden has been an active member of PTRA since 1973 and served as president in 1989-1990.

Industrial Motor & Controls is pleased to announce that we have hired Brad Nicholl as a new outside salesman. Brad comes to IMC with 15 years of PT and motor sales experience in the Ohio territory. Please visit our web site: www.imcoho.com.

“Member News”

Let PTRA call attention to your successes, growth and changes!

Send an e-mail to info@ptra.org and we'll include your news in the next edition of FOCUS.

Or, mail your release to:
PTRA, Attn: Member News
One Spectrum Pointe, Suite 150
Lake Forest, CA 92630

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.

2008

Working To Improve Your Networking Experience

by Gord Jopling, Conference Chairman



Gord Jopling

Now that we have recovered from celebrating our 35th birthday at the 2007 conference, your PTRA leadership group has put together an excellent program and venue for your 2008 conference. The 2008 conference, to be held at the Portola Plaza Hotel (www.portolaplazahotel.com) in Monterey, California, will be fun-filled and packed with challenging sessions and exciting activities that will be sure to benefit you and your business.

In an attempt to improve networking and drive discussion topics amongst us all we have brought in engaging speakers with compelling topics. On Thursday, **Dick Neumann of Grayhill, Inc.**, will speak to us from the manufacturers' perspective on how a representative can bring more value to the principal.

Friday we will continue the town hall tradition with a bit of an added twist. This year, we will follow the separate manufacturer and representative breakouts with a joint town hall of manufacturers and representatives. Be sure to take part and ask lots of questions as this will surely lead to some great insight valuable to all involved.

Have you ever wondered how to deal with your newest young employee, or the fresh new 23-year-old buyer at your customer?

Just what makes them tick? Or perhaps you need to work closely with someone much more "senior" and figure out how to invigorate them? On Saturday morning, **Bob Wendorfer of the Center for Generational Studies** (www.gentrends.com) will tackle some of these age-differential issues that face us all.

New this year we have elected to slow down the traditional "Fun Run" to a walk and give it a real purpose. The women of PTRA will be spearheading a "Walk for the Cure," a fundraising activity for Breast Cancer Research that we can all be proud of. Your support via donations and participation will certainly help to make this new event a great success.

Be on the lookout this year for some optional events like wine tasting, golfing and local tours. These additional optional events will allow you to take some time and enjoy the Monterey area. Let's not forget about the closing banquet. This private event will be held at the world-famous Monterey Bay Aquarium (www.mbayaq.org).

There is a lot that can be gained from the 2008 conference in Monterey. Be sure to take advantage of this great opportunity to "Improve your Networking Experience" amongst your peers and principals. We look forward to seeing you there. ▲

Home Office Deductions

The IRS hopes to provide an administrative solution to problems with the deduction for a home office. Some two-million-plus small-business owners take the deduction each year and one of the chief complaints is that it is too complicated. The IRS believes it has found a way to create the equivalent of "standard" home office deduction that would greatly reduce the amount of recordkeeping necessary to take the deduction. The taxpayer would still have to meet the basic rule of using part of their home regularly and exclusively as their principal place of business.

The proposal is working its way through the internal process at the IRS. The goal is to find a workable administrative solution as it would be difficult to provide relief through the legislative process. If approved, the new rules would affect 2008 tax returns.



Breast Cancer Benefit

by Kirsten Rice

My name is Kirsten Rice, my husband John and I have been coming to the PTRA Annual Conference for over 15 years. One of the more memorable events has always been Robin Tetrault's Fun Runs, and he has always put a lot of effort into organizing this for the group.

At this past meeting in Florida, some of the spouses and I started tossing around some ideas about adding an element of charity to the Fun Run/Walk — not only do we get to socialize, enjoy some fresh air and aerobic activity, but we get to raise money for some truly meaningful cause. The charity that we would like to start out with would be a walk to benefit research for breast cancer.

The statistics surrounding breast cancer are staggering, affecting the lives of millions around the world. While professionals have made some advancements pertaining to the condition, there is still a long way to go in fighting this epidemic to the ground, beating it once and for all. This year it is estimated that nearly 200,000 women will be diagnosed with breast cancer and more than 40,000 will die. Breast cancer is not exclusively a disease of women, however. Approximately 1,700 men will be diagnosed with breast cancer and 450 will die each year as well. It seems so right that we count our blessings and help to fight something so prolific while we enjoy ourselves during our walk/run.

Most all of us have either been touched by this dreadful disease or know someone who has. We would like to propose that a change be made to the walk, making it the benefactor of a different charity each year; beginning with breast cancer. We feel that an entry fee of \$25.00, and voluntary donations on top of that, would be a good start. Not only will our efforts and monetary gifts aid in the advancement of technological resources and research, but it will also spread awareness and spark involvement from our donors and those of us involved.

When you receive your registration form for the 2008 conference there will be a space

for voluntary contributions to the "Walk for the Cure." If you or your company decides to donate, you will be recognized along with other contributors at the conference. All donations will go to breast cancer research, so please consider making that donation.



Kirsten Rice

It is our hope that we can work together and turn the Fun Run/Walk into a cause. ▲

2008 PTRA Conference Schedule at a Glance

Wednesday, April 16

- 2:00-5:00 p.m. Registration
- 5:30-6:30 p.m. First Timers Reception
- 6:30-9:00 p.m. Welcome Reception

Thursday, April 17

- 7:00-8:00 a.m. Committee Meetings
- 8:00-10:00 a.m. General Session
- 8:30-9:30 a.m. "Walk for the Cure"
- 9:30-10:30 a.m. Spouse/Guest Breakfast
- 10:30-11:30 a.m. Annual Business Meetings
- Afternoon Annual Golf Tournament
- 6:30 p.m. Dine-Around

Friday, April 18

- 7:00-8:00 a.m. Past Presidents' Breakfast
- 8:00-9:30 a.m. Representative/Principal Town Hall Meetings
- 10:00-11:30 a.m. Joint Town Hall Meeting
- 11:30 a.m.-12:00 p.m. Induction of new Officers and Board Members
- Afternoon Optional Activities
- 6:30 p.m. Dine-Around

Saturday, April 19

- 8:00 a.m.-12:00 p.m. General Session
- 1:30-5:30 p.m. Principal/Rep Meeting/Interview Sessions
- 7:00-11:00 p.m. Closing Banquet

Calendar Of Events

CPMR Certification Program

January 6-10, 2008
Arizona State University
www.mrrerf.org

MANA Keystone Conference

April 9-11, 2008
Baltimore, Maryland
www.manaonline.org

PTRA National Conference

April 16-19, 2008
Monterey, California
www.ptra.org

PTDA 2008 Canadian Conference

May 29-31, 2008
Whistler, British Columbia
www.ptda.org

PTDA Industry Summit

October 30-November 1, 2008
Miami Beach, Florida
www.ptda.org

PTRA Code Of Ethics

The position of the representative is unique as the liaison between the distributor, the customer, and the manufacturer represented. Therefore, I believe it to be my responsibility:

- To hold my business in high esteem and strive to maintain its prestige.
- To keep the needs of my distributors always uppermost.
- To respect my distributors' confidence and hold in trust personal information.
- To render continuous service to my distributors, customers, and manufacturers.
- To employ every proper and legitimate means to persuade my customers to use the proper equipment for the application, if known, but to rigidly adhere to the highest standards of business and professional conduct concerning these recommendations.
- To present accurately, honestly, and completely every fact essential to my distributors' and customers' final decisions.
- To perfect my skills and add to my knowledge through continuous thought and study.
- To conduct my business on such a high plane that others emulating my example may help raise the standards of our vocation.
- To keep myself informed with respect to my manufacturers' policies, rules, and regulations and observe them in both letter and spirit.
- To respect the prerogatives of and cooperate with all others whose services are constructively related to ours in meeting the needs of our distributors and customers.

2007-2008 Board of Directors

Officers

Joel Casaubon, CPMR
President
joel@canner.com

Ron Haynes, CPMR
First Vice President
ronhaynes@robcoinc.com

Jay Holder, CPMR
Second Vice President
jay@noholder.com

Don Elfstrom, CPMR
Treasurer
donelf@kaceync.com

Mike Richie, CPMR
Secretary
mrichie@jtchapman.com

Chris Brisbane, CPMR
Immediate Past President
dchris@brisbaneindustrial.com

Ray Mazurek
Chairman, Principal Advisory Board
raymond.mazurek@rexnord.com

Directors

Cliff Bannon
cbannon@qa1.net

Tom Daddario
tomd@poklar.com

Kurt Fisher
kfisher@eip-inc.com

Gordon Jopling
gordj@mesaco.com

Doug Landgraf
dlandgraf@landraf-mcabee.com

Bob Lennon
bobl@centacorp.com

Jerry Rhodes
jrhodes@midwestptsales.com

Robin Tetrault
robin@summitagencies.ca

Executive Director

Jay Ownby
jay@ptra.org

Legal Counsel

Mitchell Kramer
mkramer@kramerandr Kramer.com

The PTRA *FOCUS* is a quarterly publication of the
Power-Motion Technology Representatives Association

One Spectrum Pointe, Suite 150, Lake Forest, CA 92630-2283
Phone: (888) 817-PTRA (7872) or (949) 859-2885
Fax: (949) 855-2973 • E-mail: info@ptra.org

Visit us on the web @ www.ptra.org