



FOCUS

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PRESIDENT'S PERSPECTIVE

PTRA — 40 years of Sales Professionalism!

by Mike Richie, CPMR, PTRA President

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Mike Richie

As we look ahead to our 40th anniversary with our annual conference on Coronado Island next May, it would seem appropriate to take a look back at how this very successful organization of PTRA got started, especially for the newer members.

Although Jake Chapman was seen as the driving force behind the formation and development of PTRA, it really came together as a group with the help of the following members: Choice Smith, Tom Grace, Gale Linster, Gene Norene, Jr., Ben Winburn, Rush Clifford, John Grether, Robert Gardner, Marion Studebaker, Gary Brown, Jim Jones and Julian Kessler.

They all felt they should have a forum to discuss the pros and cons of a particular manufacturer's ideas, discuss mutual problems, manufacturing philosophies, rules for selling, and ways to improve relationships with the distributors in our respective territories.

The first Principal members were Hub City, Winsmith, Zero-Max, Cullman Wheel, Arguto Oilless and Horton. Many more followed right behind as the association was taking root.

The Reps were debating issues like these:

1. Should reps warehouse for their manufacturers?
2. Should reps invoice for their manufacturers?
3. In what areas of activity are there conflicts of interest?
4. Should reps sell through distributors, or sell direct?
5. Should reps sell to more than one distributor in a city, and why or why not?

Back in the mid 1970s it was a different business. There were “exclusive” distributors for given cities, stock orders were placed on a weekly basis, and distributors stocked product on their own shelves.

The 1980s brought the advancement of more motion control products, moving from mechanical to electronic technology, and the “Power Transmission Representatives Association” did not want to leave this important group out. Therefore, in 1993, the association voted to change the name to “Power-Motion Technology Representatives Association.” The hyphen was used to keep the acronym PTRA.

In keeping with our Mission Statement of offering all our members opportunities for

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President's Perspective

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continuing education, in 1990 we began sponsoring the Manufacturers' Representatives Educational Research Foundation (MRERF). This foundation began offering PTRA members a three-year Certified Professional Manufacturers' Representative educational course designed to provide its participants with a greater understanding and insight into operating a more effective rep firm. In 1993, Chris and Craig Brisbane became the first PTRA Graduates of the CPMR program. Today, PTRA has over 100 members with the CPMR designation. During that time, MRERF also began offering the Certified Sales Professional (CSP) program designed toward professional sales training of representative salespeople. These two programs have brought a heightened level of professionalism to our organization!

Today, distribution of PT components has changed greatly and reps have filled a vital role. Take a look at what we do today in addition to selling, quoting and following up on orders:

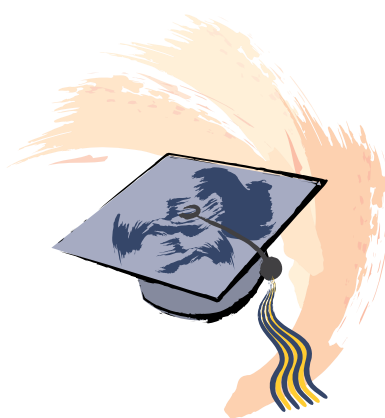
- Sales Training — Lunch & Learns at Distributors, OEMs and Users.
- Application Engineering — helping select the right product for their needs.

- Order Entry — in many cases freeing up time for inside sales.
- Order Tracking — finding out where the shipment is.
- Warehousing — to help back up Principals' stock.
- Assembly — offering quicker deliveries to our customers.
- Expediting — maintaining contact with the customer.

Now you can see that the forum our forefathers were creating has indeed become the pinnacle of what makes us the best way to take our products to market!

Yes, we have come a long way from 1972. PTRA has had its challenges, but the Executive Committees and Board of Directors have always had a pulse on how to best move forward in the most positive direction.

Today, PTRA remains as strong as ever. Over the next 40 years we will continue to demonstrate the obvious benefits and advantages that independent sales representatives deliver to their manufacturers, customers, and fellow members — and you are all part of making it happen! ▲



Educational Opportunities

CPMR Certification Program (MRERF)

www.mrerf.org

May 21-25, 2012
Indianapolis, IN

CSP Certification Programs (MRERF)

www.mrerf.org

March 6-9, 2012
Syracuse, New York
September 11-14, 2012
Denver, Colorado
October 2-5, 2012
Indianapolis, Indiana

MANA/Sandler Training

www.manaonline.org

Sandler Training Boot Camp

May 15-16, 2012
Irvine, California

Free eBook on Rep-Principal Relationships courtesy of MANA at www.bootstrapping101.com/mana

Sales/Reps/Manufacturers: Adversarial or Cooperative? Tips for Each for Mutual Gain
by Bob Reiss, author of the *Entrepreneur* magazine article about the benefits of working with reps, "Outsourcing Turns Fixed Costs into Variable Costs."

MANA/PTRA Teleforums

www.manaonline.org

(12:00 pm Eastern Time | 9:00 am Pacific Time)

Social Media

March 19, 2012

Hiring — How To Find Good Candidates, How To Interview

April 13, 2012



PTDA Report

by Don Elfstrom, Immediate Past PTRAs President

This past fall, PTRAs President Mike Richie and I attended the PTDA (Power Transmission Distributors Association) conference at the Washington Hilton in Washington, D.C. For you history buffs, that is the site of the Ronald Reagan assassination attempt in 1981.

The PTDA yearly conference (Summit) is much like the PTRAs annual event only it has a little more than twice the number of attendees. It has become an excellent opportunity for PTRAs to be invited to PTDA's conference as we get opportunities to further the rep cause throughout the event. It was an honor to be included and to be able to mix with the management of our key distributor partners. PTRAs actually contributed as a vendor by sponsoring a group lunch, and purchased the use of a display table which Mike and I worked at and gave away literature. **As a result, we have already booked two new Principal Members to PTRAs this year!**

There are some important take-aways that PTRAs can benefit from. One of them is to witness the workings of a very successful, very well-attended, first-class Summit. Unlike the PTRAs conference, the Manufacturer (Principal) attendees *far* outnumber the Distributor attendees. Every evening there are a number of hospitality events for attendees to choose from. The Manufacturers see this as an important opportunity to heavily promote their companies, and there is a form of competition to vie for their important distributor management contacts' time. Also, it's worth noting that PTRAs is a welcome addition to the PTDA Summit, and it seems that their membership has interest in understanding and utilizing manufacturers' reps. We have reached a goal we set a few years ago, which was to get closer to PTDA.

The final highlight was the finale dinner, which was held at the American History segment of the Smithsonian museum. It was very enjoyable; however it's worth noting that — our food is better! HA! ▲



Don Elfstrom

Counseling Service

PTRAs's association headquarter's staff has experience on both sides of the desk — manufacturing management and sales agency management.

These people are available for counseling on agency-principal issues and agency management issues at no charge — 888-817-7872.

Welcome New PTRAs Members

Principal Members

Michael Munn
ANDANTEX USA, INC.
Wanamassa, NJ
(732) 493-2812

Brooks Cutright
COUPLING CORP. OF AMERICA
Jacobus, PA
(717) 428-0570

Ben Talan
MOTION INDEX DRIVES, INC.
Troy, MI
(248) 743-9999

Jeff Guritza
OSBORN INTERNATIONAL
Cleveland, OH
(216) 361-1900

Candace L. Olivier
SYSTEM COMPONENTS, INC.
South Haven, MI
(269) 637-2191

Representative Members

Brian Birtic
FORCE INDUSTRIAL SALES
West Allis, WI
(414) 475-9211

Mike Clark
THE JGS GROUP
Centerville, OH
(513) 325-2270

Robert Ellis
K-W ASSOCIATES, INC.
Cary, IL
(847) 639-6630

Manuel Garcia
M.G. INTERNATIONAL SALES CORP.
Miami, FL
(305) 220-4423

Mark Green
MARTECH SPECIALTIES, LLC
Humble, TX
(832) 722-4805

Thomas Beyer, CPMR
PT PRODUCTS, INC.
New Berlin, WI
(414) 797-8266

Dave Russell
RUSSELL SALES, INC.
Grand Rapids, MI
(616) 956-9111

Neal Smith
SMITH AUTOMATION, LLC
Noblesville, IN
(317) 773-8786



Bill Taylor

“Riding The Tech Wave” PTRA Conference 2012

By Bill Taylor, Conference Chair

The 40th anniversary of PTRA will be held at the world-renowned Hotel del Coronado in San Diego from May 20–23, 2012! Emperors, kings, princes and princesses, barons and baronesses, movie stars and U.S. Presidents have all been drawn to the hotel, one of the most famous ocean-front Victorian style resorts in the world. Loaded with history, the resort served as the backdrop for the movie, *Some Like it Hot*, starring Marilyn Monroe, and L. Frank Baum wrote the *Wizard of Oz* while staying at the resort. The hotel retains its charm (it continues to maintain a hand-operated elevator) and is said to be the #1 destination for weddings in the U.S. I can't think of a more desirable destination to hold our conference and celebrate our association's anniversary.

You spoke and we listened. Back by popular

demand is Alan Beaulieu from the Institute of Trend Research whose presentations are always packed and generate numerous questions and discussions. We are in the process of completing our list of speakers and will be forwarding information to you in the coming weeks. Look for the 2012 presentations to be informative, practical and a valuable source of information relative to our business as manufacturers' representatives.

In addition, and in case you didn't know, Dr. Stephen Letterman (drbeach.org) is the Director of the Laboratory for Coastal Research at Florida International University and “America's foremost beach expert.” Each year, Dr. Letterman ranks the top beaches in the United States, and Coronado Beach was ranked #2 for 2011 and a virtual shoo-in for first place in 2012 during our conference!



On his website, Dr. Letterman describes Coronado Beach as “the toast of Southern California; it is a veritable oasis by the sea, measuring hundreds of yards wide. With its lush subtropical vegetation, unique Mediterranean climate, and fine sparkling sand, beach-goers flock to this beach for great ship watching and the summer’s mild surf.” For you beach lovers, Coronado Beach sounds hard to beat!

The Hotel del Coronado is on my “bucket list,” and I can’t wait to spend time at this historic venue and national treasure. The conference program, networking, hotel, climate of San Diego and surrounding beach make this conference a “must do” for all members of PTR. Please mark your calendars for May 20–23, 2012 and join us in San Diego! More to come soon.... ▲





Mark Hunter

Do's and Don'ts of Using an iPad on a Sales Call

By Mark Hunter

So you now own an iPad or other type of tablet and you're wondering if you should use it on a sales call.

Here are some quick rules to consider:

- 1 Don't use it just because you have one.** Who really cares? Just because you own the newest electronic gadget doesn't mean the customer you're seeing doesn't own one too — or worse yet, despises people who do own them. It only makes sense to use one on a sales call if you have a purpose for using it.
- 2 Do use it if it simplifies your sales call.** Using an iPad can be a great way to easily access rate information and other critical pieces of information quickly if the need arises. Certainly having an iPad also allows you to walk into a sales call carrying a lot less "stuff."
- 3 Don't use it to "wow" the customer.** Again, who cares? "Wowing" the customer is not why you are there. You're there to help the customer. Plus, more often than not, the person who is out to "wow" the customer with a new toy is many times the same person who doesn't have a clue as to how the toy works.
- 4 Do use it if you want to show your customer information without leaving them a hard copy.**
- 5 Don't use it if the tablet is loaded with a lot of your personal stuff.**
- 6 Do remember to have it charged before visiting a client.**

Having your rate/pricing information on the iPad is a great way to be able to show the client information without having to leave them a hard copy. In my opinion,

this is the best reason to use an iPad. We've all had experiences where hard copy information left with a potential client winds up being used as leverage with another sales representative to get a better quote.



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With the above six tips in mind, you are equipped to make a wise decision regarding the use of an iPad in your next meeting. Just remember that you aren't going to impress anyone with any gadget — unless you have a valid reason for having it there in the first place. ▲

Mark Hunter, "The Sales Hunter," is a sales expert who speaks to thousands each year on how to increase their sales profitability. For more information, or to read his Sales Motivation Blog, visit www.TheSalesHunter.com. You can also follow him on www.Twitter.com/TheSalesHunter, on www.Linkedin.com/in/MarkHunter, and on www.Facebook.com/TheSalesHunter.

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Leeson Electric

2100 Washington St.
PO Box 241
Grafton, WI 53024
(440) 298-1106
e-mail: joe.vavpetic@leeson.com
www.leeson.com

CONTACT:

Joe Vavpetic, Regional Sales Manager

TERRITORIES OPEN:

New England States
Product Description: AC/DC Motors,
Grove Gearing

TARGET MARKETS:

OEM, Distribution, Electric Motors &
Gearing

Cleveland Gear Company

3249 East 80th Street
Cleveland, OH 44104
(216) 641-9000; fax (216) 641-9080
e-mail: jatkinson@clevelandgear.com
www.clevelandgear.com

CONTACT:

John Atkinson, V.P. Sales & Marketing

TERRITORIES OPEN:

CO, ID, MT, OR, WA, WY

PRODUCT DESCRIPTION:

Standard Wormgear Reducers (1.0" to 12" C.D.'s), Helical Shaft Mount Reducers, Open Gearing, Custom Gear Drives, Speed Reducer Repair.

TARGET MARKETS:

OEM & Distribution

Dorris Co. Gear Drives, a SGC Company

17430 Malyn Blvd.
Fraser, MI 48026
(586) 293-5260
e-mail: jdiez@dorrisco.com
www.dorrisco.com

CONTACT:

Jim Diez, Vice President

TERRITORIES OPEN:

ALL

PRODUCT DESCRIPTION:

Shaft Mount, Screw Conveyor, and base type Gear Drives

TARGET MARKETS:

OEM and Distributor

Motion Index Drives, Inc.

1204 East Maple
Troy, MI 48083
(248) 743-9999; fax (248) 743-0749
e-mail: bt1@mid.us.com
www.motionindexdrives.com

CONTACT:

Ben Talan, President

TERRITORIES OPEN:

MA, RI, NH, ME, CT, VT, NY + NYC, NJ, E.PA (MANA territories 1,2,3,4,5)

PRODUCT DESCRIPTION:

Cam Driven Indexing Equipment.

TARGET MARKETS:

Medical Equipment Manufacturing,
Aerospace Manufacturing

Servomech US, LLC

806 Bay Star
Webster, TX 77598
(281) 280-0147; fax (281) 480-8656
e-mail: sales@servomech-usa.com
www.servomech.com

CONTACT:

Raul Martinez, Director of Sales & Marketing

TERRITORIES OPEN:

All USA Territories are Open

PRODUCT DESCRIPTION:

Linear Actuators, Ball Screws, Screw Jacks

TARGET MARKETS:

Renewable Energy, Automation

WD Bearing America

1490 W. Bernard Dr., Unit A
Addison, IL 60101-4337
(630) 613-9792; fax (630) 613-9917
e-mail: fmcilhone@wd-bearing.com
www.wd-bearing.com

CONTACT:

Frank McIlhone, Sales Coordinator

TERRITORIES OPEN:

All states and territories EXCEPT IL, WI, IN, and parts of OH

PRODUCT DESCRIPTION:

WD Brand Precision Ball and Roller Bearings, Combined Bearings, and Customized Bearings.

TARGET MARKETS:

OEM

Member News

SKA Simpson & Associates, Inc.

has added its third person to the Florida territory, Chris Searcy. Searcy will be based in the Tampa Bay area and covering customers throughout Florida. He graduated from University South Alabama with degrees in Industrial Management and Finance.

Visit www.skadrives.com to learn more about SKA Simpson.

Got News to Share?

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

E-mail your industry news and information or updates about your company to us at any time and we'll include your news in the next edition of *FOCUS*.

**Send your news to: info@ptra.org
Attention: News for Focus NL**

or fax to: 949-855-2973

or mail to: PTRA Member News
16-A Journey, Suite 200
Aliso Viejo, CA 92656

2011-2012 Board of Directors

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PTRA Code Of Ethics

The position of Manufacturers' Representative is unique in that the Representative is the liaison between the distributor, the original equipment manufacturer, the consumer, and the company represented.

As a power transmission/motion control advisor, the Representative upholds a high professional responsibility to the distributor and the original equipment manufacturer, and at the same time occupies a position of trust and loyalty to the company represented. Only by observing the highest ethical balance can the Representative avoid conflict between these responsibilities.

As a Manufacturers' Representative, it is my responsibility to:

- Hold my business in high esteem and strive to maintain its prestige.
- Keep the needs of my distributors at the forefront.
- Respect my distributors' confidence and hold in trust personal information.
- 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 their application, if known, while strictly adhering to the highest standards of business and professional conduct concerning these recommendations.
- Present accurately, honestly and completely every fact essential to my distributors' and customers' final decisions.
- Perfect my skills and add to my knowledge through continuous thought and study.
- Conduct my business on such a high plane that others emulating my example may help raise the standards of my profession.
- Keep myself informed with respect to my manufacturers' policies, rules and regulations, and to observe them in both letter and spirit.
- Respect the prerogatives of and cooperate with all others whose services are constructively related to mine in meeting the needs of my distributors and customers.

Professional Resources



INSURANCE ADVISOR

Pat Brown
Associated Benefit Planners, Inc.
abppbrown@aol.com
(800) 854-4636



WEBMASTER

Donna Frendt
Creative Cyberservices, LLC
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