



Who knows their territories and their customers better than manufacturers' reps? Who knows the sales profession better than reps? No contest! Reps' business livelihoods depend on that knowledge and the insights they bring to their principals, customers, distributor partners and, of course, their own personnel. But exactly how are they sharing their expertise and "teaching" all those who depend on them? How are they fulfilling the role of learning leaders in their business relationships?

These were NOT necessarily easy questions to answer for the group of reps whom *The Representor* queried for this article. Some obviously had to think in new terms to respond, but their answers should help other reps to consider and expand their own roles as learning leaders among their business associates. Whether or not you know it, reps, you have a great deal to share and to teach!

(This article addresses the first of many ERA Issue Challenges, a project introduced in Tom Shanahan's Executive Commentary column on page 11 and in the ad on page 16 in this issue. Readers are urged to refer to those pages before or after reading this article to familiarize themselves with this new and multi-faceted ERA initiative.)

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'Teaching' rep firm employees

Responses to the question of what rep owners/managers are "teaching" their employees ranged from the very specific to the very broad. For instance, on the specific side, Mike Swenson, CPMR, of the Mel Foster Company in Eden Prairie, Minn., says, "One of the learning areas we place special emphasis on throughout our organization is presentation skills. [We] recently hired a professor from the University of Minnesota to conduct a training seminar on presentation skills. After the seminar, the skills training was reinforced by each team member giving a live presentation to the professor. She then offered a third party critique ... Her candid and direct feedback led to a dramatic improvement for several individuals ... As a rep, we are constantly presenting to customers, principals and distributors, so it is imperative that we do this well."

At GSA Optimum, headquartered in Oakdale, N.Y., John Beaver reports on the most recent learning experience among his personnel: "We've all been learning the importance of embracing new lines. The mergers and acquisitions in the electronics industry have taught us that we have to make the necessary changes to adapt to the changing landscape. It's important to communicate what we've learned to other members of the firm.

"We've learned that change can be scary but good. GSA was recently awarded an additional division of a line we currently represent. It was a slightly

different technology than what the GSA sales force was used to selling. This division is slightly out of the team's comfort zone, but they quickly adapted and are realizing new successes."

For West Electronic Sales, based in Costa Mesa, Cal., CEO Dan Parks, CPMR, who is ERA's new board president, notes, "Our people have monthly sales training meetings in our office. These trainings are done by Mark Hahn [the company president] and/or our in-house line expert. Each training

concentrates on only one line for that particular month. We do these trainings in our training room, and all of our people attend. We also, as needed, do webinar trainings."

Chuck Tanzola, CPMR, of the Fusion Sourcing Group in upstate New York recounts a specific learning exercise for a new employee that ended up including other personnel with long tenures. "We recently hired a new employee for an entry level position," he relates, "and it became quickly apparent to us that in our daily conversations we were speaking a foreign language ... we were conversing in

'acronym' all around her.

"To help, we asked her to make a note every time she heard an acronym she was not familiar with and create a master list of three-letter acronyms that we regularly use, along with their meanings. We then sent the list, without the definitions included, to the balance of our office staff, who have much more experience, and asked them if they could explain each. We found that not everyone knew all of the terms, and there were — and still are — more terms being added on an ongoing basis. We all realized how much we know, but more importantly, how much we don't know and can still learn."

Tanzola adds that the online ERA Industry Dictionary of acronyms and other terms has also been incorporated into the firm's listings.

In his company, O'Donnell Associates North in San Jose, Cal., Mark Conley says that employees have access to many sources of continuing education. These include technology webinars hosted by principals, newsletters focusing on both technology and applications, ERA's free bimonthly teleforums, LinkedIn forums and other learning sources that cover new or changing technologies in hardware and sales strategy.

At Coakley, Boyd and Abbett, Inc., in Framingham, Mass., John O'Brien, CPMR, adds, "When a co-worker comes to me with a question, I like to use the opportunity to not only answer the question, but teach him or her how and where I got the answer. Most of the time, I find that the answers have come from years of experience, but they were also lessons that were handed down to me from any

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COVER STORY: Reps as Learning Leaders

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— Kathie Cahill, CPMR

number of people within our industry. Obviously, [the late] Tim Coakley and Bob Walsh [the CBA president] have been huge influences and taught me a lot, but I've also used examples of things I've learned from other individuals and events. For instance, last fall, we were asked to participate in an Internet of Things event in Boston. Having attended the EDS ERA-ECIA breakfast only a few months earlier, I was able to provide some input into the presentation that our principal and none of our other associates had seen.”

For Bob Evans, CPMR, of EK Micro in Palatine, Ill., there are “certainly teaching moments that occur” quite regularly. However, he feels, “Very often it seems what is learned by my employees from me is not one big thing but many small things. Those things are not learned in some presentation or class, but they are learned through discussions, handling daily issues, through observation and example.”

Kathie Cahill, CPMR, of the Net Sales Company in Victor, N.Y., has a similar view. She comments, “Almost everything we learn or have learned is done via on-the-job training. It might be something very casual like two reps meeting in a customer lobby where the discussion turns to process rather than the specific business opportunities on which they may be working. Questions that come up can be: What are you using for CRM? Are you happy with it? What other systems did you look

at? Do you have a good lawyer, accountant or other advisor you can recommend? Did you hear such and such company has been purchased? Have you heard so and so went to work for someone else? All of these constitute our learning or training.”

But Cahill's favorite sources of learning for herself and her personnel are the ERA conferences. “Between what I learn from the speakers and what I learn from the attendees, it's a double bonus of knowledge,” she affirms. “Reps have had so many different experiences. They sometimes do not even realize how unique the information they hold is ...”

‘Teaching’ manufacturers

Cahill believes that “teaching” principals can also follow the on-the-job training route. “Traveling with a principal in the territory can be an excellent training or learning opportunity,” she notes. “You have a captive audience for some period of time. You talk about family, customers, target accounts and so forth, but it is also a great chance to talk about process. You may have a principal who has an excellent way of tracking opportunities which is not overly time consuming for salespeople. That's worth sharing in the hope others can adopt.

‘If you happen to have a new regional person, having that person's undivided attention while in the car can prompt a conversation about distribution, customers, focus accounts and more. It really is an opportunity to share what you have learned over years of experience so that person can come up to speed quickly. It benefits everyone.’

Cahill was also one of two reps to mention rep councils in replying to the question about teaching manufacturers. “If manufacturers truly use rep councils to guide and advise them,” she says, “there is much sharing and learning that can take place in that environment. Once reps know their opinions matter on a rep council, and they can see even modest adjustments within the company on whose rep council they serve, there is tremendous buy-in, and a much closer relationship evolves.”

John O'Brien agrees, adding, “Rep councils, done properly, can be a great teaching opportunity for principals. One of our newer principals announced at EDS that they are looking to establish a rep council. My first reaction was to forward them the white paper off the ERA website on running a successful rep council. They have it and are now using it to get the rep council up and running.”

Also while at EDS this spring, O'Brien had another type of teaching occasion arise. “At a dinner with a principal,” he describes, “the subject of compensation and splits came up. It was a great opportunity for us to really dive into the struggles and obstacles we as reps face, without preaching it from a stage at a conference. Our main message to the principal was to look at compensating their regional managers similarly to the way they compensate the reps. We have found that regional managers who are judged based on the entire success of the territory are just as driven to design and capture pieces of

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business that are not consumed in their particular geography. This is absolutely something I've learned through ERA."

A recent teaching moment for Mike Swenson yielded more than the hoped-for results. He stresses, "Often times we have to rearticulate our value and resell our efforts with our principals, especially when significant management changes occur."

"There was a recent change at one of our principals, [and] working with reps was foreign to one of the new senior managers. He didn't see the rep value and thus planned to cut commission rates. I met with the CEO, CFO and vice president of sales and marketing to discuss how we have contributed to [the company's] success and the value that the rep function provides to their organization. This led to a strategy to re-engage and recommit to their rep partners. Also, as a result, we were able to renegotiate a better commission rate — up from what they were going to pay us with the new scale they were planning to implement."

Dan Parks concurs with Swenson. At his firm, "We impart information about West constantly by virtually every appropriate method. This learning primarily revolves around the rep function and how it is changing. We train on how to capitalize on this change and how to become a rep's emotional favorite. We do this by phone; we do this in our office with the principal; we use propaganda pieces; and we do this at quarterly business reviews."

A big-picture view of teaching manufacturers is also taken by Chuck Tanzola. "In addition to speaking with principals about accounts, their specific product needs and directions and the industry," he notes, "I also spend time discussing the challenges of our business and getting their input on their challenges ... We share methods we have tried to meet those challenges. I also try to speak with principals about the needs of the rep and how to manage reps. Whenever we have a principal traveling in the area, we try to take the opportunity on a management level to spend time with them outside of specific account calls to discuss the business."

A detailed learning experience for manufacturers regarding territory visits is recapped by Robert Logan, CPMR, of Kruvand Associates, Inc., in the Dallas area. He states, "We've had several of our principals push down even more requirements for inputting information into their CRMs. [As background], we have a very organized structure for when our principals come to town to make calls with us. They always state that we are one of the most organized and thorough reps they work with when they travel into a territory. We give them a very detailed itinerary, where they are staying, who is picking them up at the airport and what customers we are visiting with each of our salespeople. Then when they leave, they get a very detailed call report with actions on all the visits that were made."

"Back to CRM ... we recently started attaching copies of these trip reports after a visit to the actual opportunity in the CRM, and then taking the ac-

tions from those trip reports and assigning tasks in the CRM so that there is an owner to each task. This way, the CRM is dictating who owns the action, what the status is and the time line for completing a task. Now we don't have to send multiple reminder emails to follow up on all the actions when a principal leaves the territory after a visit."

At GSA, John Beaver mentions the firm's emphasis on increasing both the company's number and quality of personnel. As a result, he says, "Principals are recognizing these efforts and have solicited GSA to represent them in additional territories. The principals are learning that, with the proper investments, rep firms can continue to grow, even with the general downward trend in the U.S."

'Teaching' distributors

How are reps "teaching" their distributor partners? Most, but not all, of these reps' responses focus on product training.

Dan Parks relates, "Most of the training of our distributors is done at their house and usually consists of product training. Any other sharing of information is mostly done one-on-one between outside sales teams and sales management teams."

There is less time available for distributor training, according to Chuck Tanzola. He says, "Most of our training time with distributors is directed at product information and the associated account and market discussions that go with it. These formal
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— Mike Swenson,
CPMR

Targets SiC MOSFET Devices
QA01C DC/DC Power Module

The image shows a circuit board with a blue QA01C DC/DC power module and a yellow SiC Drive component. Dimensions are indicated: 12.3mm, 19.50mm, and 8.8mm. The module is labeled MORN SUN QA01C.

- +20V / -4V DC, 100mA output
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COVER STORY: Reps as Learning Leaders

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training opportunities are getting harder and harder to schedule, and the available time on the part of the distributors is much reduced. For example, when I started in this business, I averaged making three formal training meeting presentations per week, every week, all year. That is long gone! Most recently, I have found success in presenting interactive, hands-on training of mechanical products — involving demonstrations and physical samples, etc. — as opposed to PowerPoint presentations.”

And, of course, when discussing rep-distributor partnerships, buddy calls are mentioned. John O’Brien feels, “Buddy calls with our outside salespeople are far better training methods than the old all-hands, half-day training. We can focus in with all of our lines in common and on specific applications.”

He relates a recent experience: “In June, I was doing a buddy call with a distributor for one of our lines we had in common. We met with an engineer and discussed some of the difficulties he was having with his product selection. The customer had asked the distributor for an aluminum electrolytic capacitor, and while we definitely could have provided one, in our discussions we actually realized that a film capacitor would work better for his end product. The customer was pleased and opened up the rest of his design to us. We now have a fuse, resistor and crystal designed in.”

O’Brien also notes that he, Mark Conley and ERA Chairman of the Board Paul Nielsen, CPMR, of Brainard-Nielsen Marketing in the Chicago area, were recently invited to meet with the management team of a major distributor. “Specifically,” he says, “they wanted to know how they are perceived in the marketplace.” The assumption is that plenty of distributor learning occurred in that meeting.

Mike Swenson’s firm directs one of its outreach efforts to new distributor personnel. “One of the areas Mel Foster focuses on,” he describes, “is the training of new field sales personnel in distribution. We feel this is extremely important given the focus some of our distribution partners are putting on emerging account sales. As a result, we have a plan to step up training to these individuals and be more

available for discussions and buddy calls. Training sessions are scheduled in our office every few weeks to engage the new employees with the product lines we represent and help them in learning what different technologies do for their account base and how they can be successful selling common lines.”

In the metro New York City area, John Beaver recounts how “distributors have learned the importance of networking” through ERA chapter programs. The most recent event featured a distributor, contract manufacturer and rep panel discussing a variety of topics, including: why large-volume customers and contract manufacturers feel registrations keep prices higher; how mergers of semiconductor companies will affect reps and distributors; and the effects that third-party logistics companies, such as DHL and Amazon, are having on the industry.

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— Chuck Tanzola, CPMR

So, reps, with these ideas to spur you on, what will comprise YOUR learning leader activities in the coming year? How will you boost your employees’ knowledge and enhance your value to your principals, distributors and customers? Remember: ERA has volumes of resources, all available online to help you. Email info@era.org for assistance. ■

This article was written by Tess Hill, editor of The Representor.

Reps & Manufacturers:
SUCCESS
lies in **HOW** you
answer the challenges.
Find help at era.org.

How have you improved your industry?

How should you build your network?

What don't you know, and how will you fill those gaps?

How do you use CRM?

What's your legacy? Where and how have you helped?

Whom don't you know, and how will you connect with those people?

Amazon's coming! What will you do?

How have you recently become more efficient and productive?

What's your social media strategy?

Do you have business mentors? If not, how will you fill that void?

Are your new line interview and preparation and processes up to date?

Who's your next principal or rep?

What's your transition plan?

Are you in 'coopertition'?

