



**Attendee Chat Log – September 22, 2020**

**Gary Smith to Everyone**

I would go as far as to say that in these difficult times we ask our principals to channel all quotes to us so we can present to the customer.

**Rick Dale**

One thing that has changed is that there isn't much chance for "exploratory" calls. You have to understand the direction the customer might be going in & be prepared to tailor the conversation to their specific needs. And I agree with the 15-20, max 30 minute meetings.

**Gary Smith to Everyone**

What would you say to a principal that asks for your CRM database ?

**John Latimer to Everyone**

Pound Sand! (Very politely)

**Chuck Tanzola to Everyone**

Gary - I would say that this is our IP, and we don't share it except as appropriate with that specific manufacturer (i.e. common opportunity info, some contact info, etc.) -- also very politely.

**Mark Conley to Everyone**

I agree with John. Our CRM is our intellectual property.

**David Dasson to Everyone**

That is our IP, and would not give it out. We have already said NO to a couple of principles that have asked.

**Gary Smith to Everyone**

Should ERA develop a white paper on how a principal can reach out to the marketplace that best compliments the rep function ?

**Byron Holloway to Everyone**

Gary, when asked. we provided the 1/2 contacts that are directly involved with current programs in progress with the customer, but we never provide our contact database

**Gary Smith to Everyone**

I have told them, and done several times, we will do the email blast for them from our CRM.

**Perry Thornton to Everyone**

Gary, we actually saw that stated in a contract and red lined it. They agreed that it was asking too much.

**Terri Straube to Everyone**

Really great session. Thanks to everyone.