

# The *Representor*

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 Electronics Representatives Association

SPRING 2024



EDS SHOWCASE p. 22



## ENSURING SUCCESS IN YOUR SUCCESSION PLANNING

Creating a structured succession plan to instill clarity and confidence in the future of your firm

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Advancing and supporting the professional field sales function in the global electronics marketplace through programs and activities that educate, inform and advocate for manufacturers' representatives, distributors and their principals.



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ERA IS A MEMBER OF THE:  
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■ THE REPRESENTOR (ISSN 1057-0373) (Vol. 35, Issue 2), is published by Electronics Representatives Association, 1325 S. Arlington Heights Road, Suite 204, Elk Grove Village, IL 60007. Additional ERA member company, manufacturer or distributor member annual subscriptions are \$24.00 each. Non-member annual subscriptions are \$48.00. Foreign annual subscriptions are \$50.00. (All prices quoted are payable in U.S. dollars.) American Express, MasterCard, Visa and Discover charges accepted.

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# ENSURING SUCCESS IN YOUR SUCCESSION PLANNING

Creating a structured succession plan to instill clarity and confidence in the future of your firm



## COVER STORY

Standing in line at the deli at Publix Supermarket this week reminded me of succession planning. You know how it is, as each of you has been in this kind of a position before. There was a succession plan in place. Each person grabbed a number to determine their position in line to place their order. This, of course, is very simple. Each person knows when they are up next.

But what happens if they run out of numbers? And you show up to place your order and you are not sure when or if you will be next? This is not so simple, and it can create conflict.

Many organizations like yours are in such a predicament. There may not be a plan to know who will succeed the CEO, the founder, the president or others through the chain of command. To whom will you pass on the legacy of the company? Maybe it's a daughter or son, maybe it's the next ranking person, maybe it's someone outside the company. Whomever it is, they need to be ready and you need to get them ready. And, after you get them ready, you need to let them go.

Creating a structured succession planning process is essential if succession is to be done well. This process should include, at a minimum: defining key roles, identifying potential successors, assessing their readiness and creating development and communication plans to prepare successors for future roles.

Where do you start? Figure 1, called the E/3D model, can help you in your succession planning. This model has four steps: explore, define, design and deliver.

### Explore

When in the context of exploring the need and effort for succession planning, you want to look at how other organizations are doing it, or have done it, or talk with consultants who have done such planning. What has been successful? What are your strengths and opportunities in it? What have you asked or talked about with your team, employees, shareholders and customers?

For one of our clients, this was a huge concern. They had seen succession done so poorly, they feared to do it wrong themselves. Many times, the fear of failure has captivated us more than the joy of potential success. Consequently, they hesitated at many stages, and this set them back months.

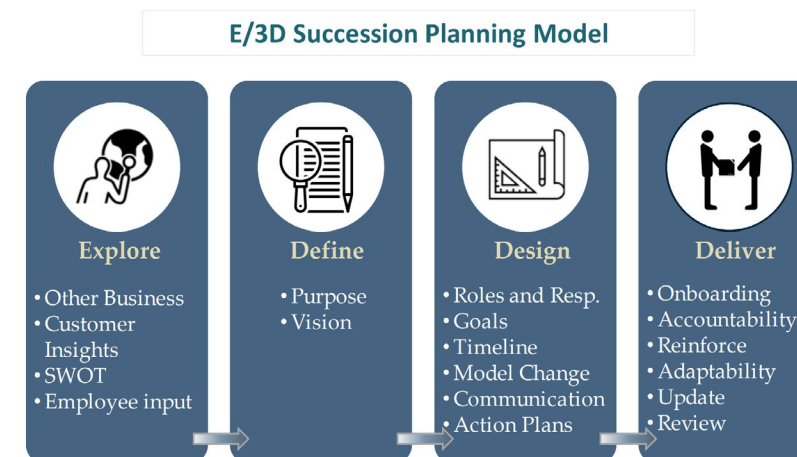
To begin, one of the most significant questions is: What is your timeline? In working with various organizations, over the past few years, we've discovered that the longer the timeline, the better. Two years or longer is ideal. This doesn't mean you can't be successful in a shorter timeframe; it just means you have to work harder — and probably a little faster.

### Define

Clarity is the first law of learning. So, the next key consideration is defining what is the purpose of the succession. The question of purpose may seem obvious, but we have found that those involved have differing perspectives and agendas. What is the vision or outcome of the plan? Will the vision of the company change with the successor? How will that new

*(continued on next page)*

Figure 1.



By Mark A. Noon

With contributions from  
Dianne Guthmuller and  
Robb Schiefer

## COVER STORY: Ensuring success in your succession planning

(continued from previous page)

vision be communicated? Without a vision, the organization suffers.

Organizations should have a systematic approach to identifying key succession candidates, as well as the plan for implementation.

Identifying (defining) key succession candidates is a crucial step. This involves assessing current employees based on their performance, potential and alignment with the organization's vision, mission, core values and strategic goals. Key succession candidates are individuals who have the skills, experience and motivation to take on leadership roles in the future; and motivation is not always easy. What roles have they been assigned to, what responsibilities have they experienced and how has this contributed to their development?

Once key succession candidates have been identified, and behavioral and motivational assessments completed, organizations need to invest in developing their talent for future roles. What goals need to be accomplished? This may involve training, coaching, stretch assignments and other development opportunities to help individuals build the skills and capabilities needed for leadership positions.

By investing in the development of key succession candidates, organizations can ensure a smooth transition when current leaders leave, while also building a strong leadership pipeline for the future. Know this too: Roles in the organization may be elevated, reduced, added or deleted. This might greatly influence the plan and preparations.

### Design

Designing the plan is not the most difficult part (that lies in the delivery), but it does take a lot of thought and preparation. It is intricate and can involve many players.

Dwight Eisenhower once said, "Plans fail, but planning is essential." This means we don't always get it right in the first half of the game (or in this case, the attempt). A football team goes into halftime to make adjustments and comes out in the second half with a better plan to win.

What does the design look like, and how will you know it's right? For most leaders, the idea of failing is the barrier that keeps them from the design phase. The change leadership needed here is a very important step. This is not change management; it's change leadership.

Over and over we hear, and we read, that many leaders do not want to get it wrong and so they put off the plan, until they know it will be right. Assuredly, you won't get it all right, but planning is essential. In addition, having help along the way can ensure your success.

The key steps in the design phase are leader development (LD), communication and modeling.

How much leader development is necessary will depend largely upon the level of experience, the role of the successor, the adaptability of the organization and the timeline of the plan. If you are already heavily engaged in leader development, then once the plan is in place, the need is not as desperate or great.

Leader development should happen on a quarterly basis for all organizations for all leaders, regardless of the need for a succession plan. If you are actively in the successor process, and are on a two-year timeline, this process works well. If you are more rushed, then bimonthly may be necessary. However, consider the following questions: Who needs to be developed more than others? Who needs to have monthly coaching to get them ready? All leaders can participate in the LD process, but your key successors need some extra attention. What is the process you have for accountability to the LD process? How often are successors and leaders getting feedback on their progress? Monthly would be our recommendation.

The importance of having a robust communication plan within the organization's strategy cannot be overstated. The more communication, the better. So, what does that look like? I'm glad you asked.

Monthly communications to the whole team are ideal, and can be accomplished via email, video messages, newsletters, town hall meetings and leader follow-up. The first three are easy, and mass produced. The town hall meeting is simply an executive leader-led forum to connect the updates and necessary information. But, the leader follow-up effort often can present a challenge.

Leader follow-up goes like this: The senior leaders, who are responsible for the original communications and the updates, are also responsible for connecting with the staff to ensure they know what was communicated. Literally, this is a "tell me what you know" kind of question to individual staff members to learn how well the plan has been conveyed and executed.

Lastly, the modeling of the change. What is meant by this is how well the team responds to the changes and responds to the new successor. You communicated the plan, now we model the new organizational structure.

### Deliver

Delivering results can be the most difficult part of the succession plan. This involves accountability, which is a word that has stronger meaning in some organizations than in others. Accountability is necessary because the delivery takes time, effort and tenacity to ensure the proper outcomes.

There must be regular updates between leaders, and then

*By investing in the development of key succession candidates, organizations can ensure a smooth transition when current leaders leave, while also building a strong leadership pipeline for the future.*

shared with the team. Adjustments will be made and must be demonstrated to the organization so there is no confusion between the original plan and the "new" plan. The lack of updates and necessary reasoning can cause distrust, among many other concerns.

Another often-difficult part of this plan, especially if you are the founder-legacy holder, is to let go. This is your baby. You raised it. You nurtured it. Now, you have to let it go. That is not easy. Leaving well assures the next generation of your confidence in their skills and leadership. Leaving well allows them to flourish. Our experiences have shown this to be one of the challenging things leaders struggle with. At least four of our recent clients have had extra coaching along this struggle.

Also consider, what is the risk if you don't do succession planning? The risks are: loss of talent, skills and knowledge; lack of commitment in the successor; loss of time; and disruption to the organization, the employees and the customer.

Don't delay. The sooner you get started, the more adept you will be in the plan.

Succession plans are never going to be the same for every organization, nor even every time the same organization executes the plan. Regularly evaluating and adjusting succession plans is important to ensure their effectiveness.

By continuously evaluating and adjusting succession plans, organizations can adapt to changing circumstances and ensure that they have a robust pipeline of talent ready to lead in the future.

Bringing on a team of experienced coaches can certainly give you the assurance you require, the confidence you desire, and the motivational fire to help you put "success" into your succession plan. ■

### About the author



Mark A. Noon is an international speaker managed by the Executive Speakers Bureau and a principal and co-founder of LEADERSHIPTEN (L10), a leader and organizational development practice based in the Florida Panhandle. Along with principal co-founders Dianne Guthmuller and Robb Schiefer, their mission is to create leaders who boldly impact their organizations, communities and families. If you would like to have Mark as a speaker at an event, or connect with L10 about your organization and ways they can help in the succession plan, leader development or executive and leader coaching, please contact them at [info@leadershipten.org](mailto:info@leadershipten.org) or 850-855-6898.

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**Danielle Vitales**  
Director of Distribution  
Luscombe Bridge

*To gain better insight into how early career professionals in the electronics industry have turned challenges into opportunities to ensure continued growth, The Representor interviewed Danielle Vitales, director of distribution sales for Luscombe Bridge.*

*The former preschool teacher shared the challenges of joining the electronics industry rep and distribution world during COVID-19 and how she is learning to establish relationships, absorb knowledge and ask the right questions to succeed in this business.*

**Please tell us a little bit about yourself, personally and professionally.**

I am married and have two sons and two bonus daughters. My sons are both in college, one graduating this May from SJSU with a mechanical engineering degree and the other is in his second year at a local junior college. I am passionate about weight training as a hobby and would like to get into the competitive lifting world. I love hopping on the back of my husband's Harley Davidson and hitting the open road.

After working in distribution for a year as an inside sales representative, I made the move to the rep side and have been the distribution sales manager for Luscombe Engineering of SF, and now the director of distribution for Luscombe Bridge.

**What made you choose this industry as your current career path?**

I worked as a preschool teacher for 16 years! As we were emerging from the COVID-19 shutdown, a job listing was brought to my attention by my mom, who works in the industry, for an entry level position as an inside sales representative. It felt like the right time to take a leap and make a complete career change so I gave it a shot! I have now been in the electronics industry two years this past January.

**What are some of the main challenges you encountered as you embarked on your career journey?**

First, the biggest learning curve for me has been the technical aspect. Yes, we are all told that it will come with time, but the type of person I am means I'd like to have some intelligence behind the products I represent. Secondly, learning the different go-to-market strategies and roles within different branches has been a lot to take in. Finally, asking the right questions.

**What are some steps that you have taken to overcome these challenges and to ensure that you can establish and nurture a successful career?**

While we have frequent supplier training, I find that I learn best when I can see the products being used in applications. Being able to touch and feel the components helps. My goal is to be able to look up customers and from their website be able to determine where my parts will fit in.

Establishing relationships has been pivotal in my penetration into distribution. To further grow, I plan to learn more about distributors' specific go-to-market strategies, the terms they

offer and vertical markets that will be targeted. There have been several times in the past two years that I have questioned if I have given enough input into the conversations of which I have taken part. But I realized that the quality of the question carries more weight than the number of questions I ask. Being "newish," I tend to sit back and observe, make solid eye contact and listen. Maybe I am an easy person to talk to, but people tend to open up and share lots with me!

**What are training tools or networking/industry events you find beneficial to your professional growth?**

I believe nothing compares to face-to-face training and onboarding. I am surrounded by decades and decades of experience and knowledge. I try to be a sponge and absorb endearing qualities from those that mentor me, and those that I have met along the way that are willing to share knowledge and tips.

**Do you think there is enough new talent entering the electronics industry? What could make this field more attractive to future young professionals?**

Yes and no. I keep hearing that the torch needs to be passed to younger and fresher people so that the industry does not die out. There needs to be a healthy balance of new and old. Critical to our success is our onboarding process. If you have too many new-to-the-industry hires, our vetted team members may be spread thin in training. Flexibility and work-life balance are at the top of the list to make this field more attractive to young professionals.

**Where do you see your profession and the industry 10 to 20 years from now?**

I aim to redefine the role of a distribution sales manager. The more measurable data I can provide, the more valuable I am. Factories will see our commissions as an investment, not an expense. I foresee a booming industry ahead, with AI playing a prominent role. Engineers might become increasingly reliant on AI, reducing their inclination to seek assistance from humans. We must adapt and think innovatively.

**Professionally, what keeps you up at night?**

I am content with my current workload and productivity level. I recognize that there are limits to what I can accomplish and how many people I can please. I consistently remind myself that I can only control my own actions. If I've given my best effort, there's no need to lose sleep over anything. ■

# MOVING ON

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## SOMEONE YOU SHOULD KNOW



**Mallerie Merchant**  
Partner  
R.C. Merchant & Co.

*With so many ERA members, it is not easy to get to know every rep, manufacturer and distributor in the business. "Someone You Should Know" is The Representor department that gives readers the chance to learn about fellow ERA members, including how their time is spent both in and out of the office.*

*Meet Mallerie Merchant, partner at R.C. Merchant & Co., a manufacturers' rep firm that is celebrating 100 years in business in 2024!*

*The Representor asked Merchant a few questions about her time in the manufacturers' representative business and her experiences with ERA. Here is what she had to say.*

### Tell us a little bit about yourself.

I was born and raised in Detroit and have lived here my entire life, except for a 10-year period when I lived in Chicago, which is where I went to college and started my career. I am the fourth generation in my family to work at R.C. Merchant. I have finished five marathons, I have a rescue dog and I love anything to do with the water, including swimming, scuba, kayaking and boating.

### What are some things you enjoy outside of the workplace?

Outside of the workplace, I enjoy renovating older houses. I purchased and renovated a 100-year-old house and have renovated a few older properties with my fiancée. We just recently purchased a house and I'm looking forward to renovating it.

### How long have you been an ERA member and how long have you been in the rep business?

Our firm has been a member of the ERA since 1937. I began my career in the electronics industry in 2011 and have been with R.C. Merchant since 2017.

### How did you become interested in becoming a rep in the electronics industry?

I was born into the business and would go to the office when my grandfather was running the company. As a child, when I would arrive at the office, my grandfather would always have a job for us—a real job—one time, it was sorting fuses. In the summer, I would work for the company and do anything that was required, whether it was cleaning up or stuffing envelopes.

When I finished college, I worked for a Chicago-based distributor of electronic equipment. I worked there for six years where I learned the ins and outs of sales and what it takes to be a manufacturers' rep.

### What have you found to be the most rewarding about the rep business?

What I love about our industry is that it continues to grow as electronics become integral in almost every product we use in our lives. What's exciting for me is that we get to

be a part of so many different applications and learn about a huge variety of emerging technologies. I love that our industry is constantly changing and is always exciting. For example, as a manufacturers' rep firm headquartered in Detroit, we have seen a huge shift in the technology used in vehicles in the last ten years.

### Briefly describe your rep firm.

R.C. Merchant is a 100-year-old manufacturers' representative for electronic and electrical products serving Michigan, Indiana and Ohio. Our lines are primarily sold into large data centers and manufacturing facilities. We serve the auto, healthcare, military and other industries with manufacturing facilities. Our product portfolio includes assemblies, displays, switches, power supplies and microelectronics. I'm the fourth generation of my family in this business so I feel like it's in my blood.

### What are some recent innovations, best practices and innovations your firm has made?

As our industry ages and many stalwarts are about to reach retirement age, we are focused on planning for the next generation. As a company, we have spent a lot of time planning for turnover as employees begin to make retirement plans, and as part of that, we have created a program where we bring in the next generation of our team at least a year before employees retire. We feel that maintaining stability is incredibly important for our customers and the lines we represent, and we want new employees to be embraced into our culture and be strongly mentored. This year of overlap also allows us to vet the situation and determine if the person is the right fit for our company and the accounts they are managing. Investing in this plan allows us to be very proactive and strategic in the training and hiring we do.

### What have you learned or what contacts have you made through ERA that have had the most positive impact on your business?

I have had the opportunity to attend many ERA conferences both as an adult member of the industry and as a child, getting my first

*(continued on page 43)*



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# 2024 ERA Conference

All Systems Go! Energizing Our Customers' Experience



All Systems Go:  
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Austin, TX  
Feb. 25-27

Conference survey results showed that 97% of 2024 Conference attendees would recommend the ERA Conference to a colleague!

The sold-out 2024 ERA Conference took place Feb. 25-27 in Austin, Texas, with a record-breaking 650 people in attendance!

Manufacturers, distributors, reps and consultants gathered at the AT&T Hotel & Conference Center in Austin, dedicating two full days to learning, collaborating and networking. The Conference agenda included a welcome reception, opening keynote speaker, four general session speakers, 15 breakout sessions and an off-site party at Punch Bowl Social.

Save the date for the 2025 ERA Conference, which will be held Feb. 23-25, returning to the AT&T Hotel & Conference Center in Austin, Texas.



Top: The 2024 Conference theme was serving the customer.

Center: A panel of "Zillennials" present their thoughts at a popular breakout session.

Center right: Mike Budde Jr. accepts the Tobin Bridge Award on behalf of his father, Mike Budde Sr.

Bottom left: ERA Board Chairman John O'Brien, CPMR, presents the Lifetime Achievement Award to Dick Neumann.

Bottom right: Keynote speaker Stacey Hanke presents the keynote session on communicating with influence and impact.



Top: Electronics industry reps, manufacturers and distributors listen to a general session on creating customer confidence.

Top left: Holly Myers is presented with the 2023 Tess Hill Award.

Top center right: Bryan White, CPMR, accepts the 2023 Ray Hall Spirit of ERA Award.

Center right: Zach DeVillers, CPMR, CSP, accepts the 2023 Jess Spoons White Pin Award. and Scholarship.

Center middle: Conference attendees enjoy food, mingling and games at Punch Bowl Social on Monday night.

Bottom left: Attendees listen to a breakout session on real-world AI applications for field sales.

Bottom right: The Sunday evening welcome reception was held in the AT&T Hotel & Conference Center courtyard.



93% of 2024 ERA Conference attendees plan to attend next year's Conference!





These companies joined ERA since the Winter 2024 issue of **The Representor**.

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- Split Influence (Commission) Recommendations for the Electronics Industry
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**ERA Meetings & Programs**

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Chapter Officer Leadership Training (COLT).....Nov. 6-8, 2024  
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**EXECUTIVE COMMENTARY**

**What gets measured, gets done**

So, here we all are in our new and different venue at EDS — Resorts World! It is such a wonderful property, shiny and bright, with plenty of outside light and windows — a rarity in Vegas, I am told, where there are typically almost no clocks or windows to let folks know the time of day.

Our attendees cannot be fooled. They all know the day/hour/minute of their time at EDS. The investment in both time and treasure that each attendee makes to participate at EDS makes it critical that every second is productive.

Many of you had been asking for EDS to look at a new venue after several years at the Mirage. Even though this new venue was dropped into our laps late in the game, we will all be pleasantly surprised at the newness and freshness of the venue; more restaurants, more places for breakfast/lunch, a Starbucks...and windows!

When EDS Show Management was informed that the Mirage was not able to accommodate our 3,000-plus attendees, it sprang into action and sought out another property that could accommodate us in an unheard-of lead time of 90 days! Most conferences like EDS are booked 2-3 years out into the future. Your EDS team was able to find and contract with Resorts World in 45 days!

Some of us may have run into a few logistical issues as EDS Show Management helped the Resorts World property navigate their way into managing EDS. Our show has some unique nuances: the need of suites for meetings; finding hotel rooms for 3,000 attendees, providing security for the show, helping our attendees with lunch and dinner reservations and last-minute requests due to the fast pace of EDS.

I applaud both EDS Show Management and Resorts World for making EDS 2024 a reality! We are truly lucky to even have EDS this year due to the short timelines and huge logistics required to put on this great show.

I expect that there may still be a few “learning curve” issues while here. Let’s all try to be a bit patient with both EDS Show Management and Resorts World. A new venue will always mean some challenges — but let us help them so they can help us.

Here are some of my takeaways from the annual ERA Conference held in Austin on Feb 25–27:

• The thirst for knowledge from our attendees remains insatiable! We had a total of 14 hours of educational content at our general sessions and unique breakout sessions over two days and, based on the results of the post-conference survey, they wanted more!

• The economic climate remains somewhat uncertain with excess inventory rapidly coming down, and a hopeful return to a positive book-to-bill ratio. However, our attendees remain bullish on the overall electronics segment asking: “What other industry would you rather be in? None!”

• Finding, interviewing, hiring, onboarding and keeping early-career individuals remains a high priority with all of our company attendees. We must continue to “restock the pond” in order to have our companies remain viable in the future.

• Artificial intelligence—boy, did we talk about AI! There were two sold-out sessions on AI. Our attendees just cannot get enough of it. Now, all of us need to learn how to use it to grow our businesses and remain ahead of our competition.

• Data. We are swimming in data. But what good is it if it is not current and in a usable format? How can we use the reams of data in NBOs, POS, leads and quotes to monitor and drive our companies?

• Our procurement and engineering customers have changed forever! But have we? Do we know how they want us to interact with them versus how we want to interface with them? When all else fails, listen to the customer. They are your True North—listen to them.

• Succession plans. Does your organization have a succession plan in place? Do your employees know what it is?

There was so much to absorb and all of us left Austin upbeat and perhaps better equipped to face the future. But we need to take action now on what we’ve learned. As the saying goes, “What gets measured, gets done.”

What will you be measuring at EDS and during 2024?

Inquiring minds want to know, and your manufacturers, reps, distributors, customers and employees need to hear from you. Do not make them guess. They may guess wrong and cost you a manufacturer, key employee or customer. ■



by Walter E. Tobin  
ERA CEO  
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**FROM THE TOP**

**Accessing the customer**

Sometimes, it gets difficult to come up with ideas for my articles, so I'll reach out to others in the industry to see what's on their minds. Two early career professionals gave me inspiration for this article's timely topic. I broached this topic back during COVID-19 and thought it would be a good idea to see where we are now. In general, talking to a lot of salespeople, the face-to-face meeting is getting increasingly difficult to confirm.

We've all faced it: we have a principal coming into town and the sales team is having difficulty filling time slots for in-person visits.

As the work market has shifted, so has access to customers. Almost all customers are doing some percentage of remote work. While we've seen a small swing in companies requiring people to come back to the office, it is not full-time, nor is it always on a particular schedule. Therefore, accessing these customers can become a logistical nightmare. How do we coordinate their availability with our travel timing?

Also, in a down market, companies may have started cutting back on employees, causing those left to pick up the duties vacated by someone's departure. Customers are doing more with less people. Their time is being managed by their superiors and in order to get some of that precious time, we need a compelling story. How do we get access to that time they do have?

We have found that it is more critical than ever to be able to articulate our need for a meeting with the customers. Answer the question, "Why do I need to meet with you?" There are a number of methods I've found that can help pave the way:

1. By understanding the customer's drivers, you can tailor your approach to helping them meet their goals. It may sound pretty basic but just asking them, "What are you trying to accomplish and how can I help you get there?" is an easy way to start.
2. Have a detailed agenda and stick to it. We have found that especially with engineers, if we can provide a detailed agenda, they can run it by their management and likely get a sign-off to attend.
3. Don't be afraid to go offsite. Using a coffee shop or restaurant close to where the customer works remotely can be very successful.

Our principals pay us for access and influence. We need to be able to access the customer's decision makers. Nowadays, that means on the customer's terms, but it's still critical we can gain access to them. Influence is our ability to entice our customers to utilize our products. Again, that's where the prep work becomes critical. The prep work enhances our ability to articulate our principals' products and influence the customer's use of them. I've said it before and will say it again: Our preparation is the key to accomplishing both. ■



by John O'Brien, CPMR  
Coakley, Boyd and Abbett  
ERA Chairman of the Board  
[jobrien@cbane.com](mailto:jobrien@cbane.com)



# Mark Motsinger, CPMR, gratefully acknowledges his ERA Hall of Fame Award



By Mark Motsinger, CPMR  
President, Wallace Electronic Sales

At my first Carolinas ERA Chapter meeting more than 40 years ago, Bruce Scoggin and Tommy Adams approached me. They asked if I would volunteer as the chapter's vice president. I said yes—and I haven't said no to ERA since.

Just one word launched a relationship with ERA that would define so much of my career. As I process the great honor of my induction into the Hall of Fame this year, I keep returning to the relationships that anchor so many of my professional opportunities.

There are so many people like Bruce and Tommy who encouraged and supported all of my involvement with ERA. But I have to first acknowledge the most important people in my life—my family. The work of a field sales representative takes us away from home. (My daughter once told her first-grade teacher that I worked in hotels.) And it always seemed that the water pipes only broke and children stayed home sick from school when I was on the road. I am lucky that I got to come home to my wife, Patsy, who managed our household, the broken pipes and the sick children with love, humor and gumption.

My family also led me to ERA. Our company, Wallace Electronic Sales—then helmed by my father, Morris—joined ERA in 1951. All these years later, active participation in ERA is a foundation for our company and is critical to our continued growth and success. I am also indebted to all the national and regional reps that I've met along the way. Their commitment to ERA's mission ensured that I succeeded as an

association leader. When I became the person asking the new rep to volunteer to help, the answer was almost always "yes." You have also become some of my closest friends.

Ultimately, there are too many people and not enough words to express the depth of my gratitude. Please know that my interactions with each and every one of you established ERA as the most professional and dedicated group I have ever worked with.

I am also so optimistic about the future and the new generation of energetic reps who will be tomorrow's leaders. Reps are, by nature, adaptable and quick, driven by passion

and creativity. It is exciting to imagine where we will go next. I am confident that ERA's efforts to advance the industry standards of excellence are essential to the continued success of companies like Wallace Electronic Sales.

I believe that the greatest threat to our model isn't competition from our fellow reps; it's a lack of competition. If there aren't enough good reps in the territory, manufacturers will be forced to find an alternative method for field sales. We may compete on specific sales opportunities, but we are all on the same team, working side by side to make the rep model the winning choice for field sales.

We thrive together because we ask each other for help—and when we can, we say "yes." ■

*We may compete on specific sales opportunities, but we are all on the same team, working side by side to make the rep model the winning choice for field sales.*

# Mark's industry peers give praise

**Walter Tobin, CEO of ERA**

"In trying to learn as much as I could when I joined ERA, I was told, 'Reach out to Mark Motsinger: he can guide you on all things ERA!' Boy, were they right! Mark told me about his 16-year involvement in the ERA White Pin initiative, the educational arm of ERA, and his participation at electronica in Germany to help educate EMEA manufacturers on the Americas' non-stocking rep model and to help expand ERA into a global organization. Mark's mentorship has meant so much to me. His passion for our industry and his willingness to 'give back and then give back some more' is a model for us to follow. I am blessed to have met Mark and count him as one of the biggest influencers and mentors to me and to so many others."

**Tess Hill, Former Operations Director, ERA**

"It was an incredible joy to have worked with Mark over his several decades in ERA leadership. Starting in the early 1990s and extending to the 2010s, he was the engine that drove so many accomplishments as they moved from 'just an idea' to concrete reality. In addition to being a savvy entrepreneur, Mark also exemplified the heart and wisdom of an educator, always aiming to help others learn. It would be impossible to count how many lives he has touched in significant ways, including mine. What an honor it is to call him my friend and to congratulate him on this well-deserved recognition!"

**Tom Griffin, CEO, Catalyst Unity Solutions & ERA Board President/SVP of Finance**

"I met Mark at my first sales meeting in the rep business in the late 1980s with Erni Components. His presentation that day inspired me, and he has continued to inspire me ever since."

**Karin Derkacz, Operations Director, ERA**

"Like his father, Morris, who was the epitome of a professional and a gentleman, Mark has filled his dad's shoes. Once Mark became the chair of the White Pin Group, it was our phone conversations that brought me the joy of knowing him both professionally and personally. Congratulations, Mark, on joining the ERA Hall of Fame! You earned it."

**Ellen Coan, CPMR, VP Operations, C C Electro Sales, Inc. & ERA SVP of Education**

"Mark and I worked together for years on the ERA internship program and we just finished our third year of awarding rep internships for the summer of 2024. Mark's passion for this program never waned. It is appropriately called the ERA White Pin Mark Motsinger Internship Program. Through the years we researched sales degrees and certifications at colleges. We visited our alma maters (his is Duke and mine is Purdue) to learn about technical sales degrees so we could share where you might find new talent and share the rep business model. Today there are more tools like Handshake and LinkedIn to market our rep job! He was one of the many rep mentors I have had through the years who shared table knowledge at the ERA Conference year after year. He encouraged me to buy my team laptops and use CRMs to keep efficient and productive...now we are in the cloud and using AI! The world is moving fast around us and Mark has always been at the front of the pack leading us through it all!"

**Holly Myers, Director of Supplier Marketing and Management, Sager Electronics**

"Congratulations on earning this well-deserved award, Mark! When I joined the industry, your mentoring and encouragement convinced me to get actively involved with ERA. This decision has positively impacted my life, personally and professionally. Your dedication to ERA and the industry as a whole is inspiring." ■



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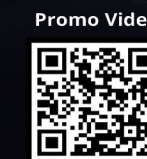
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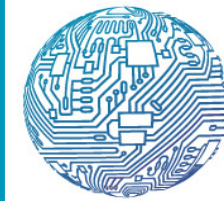
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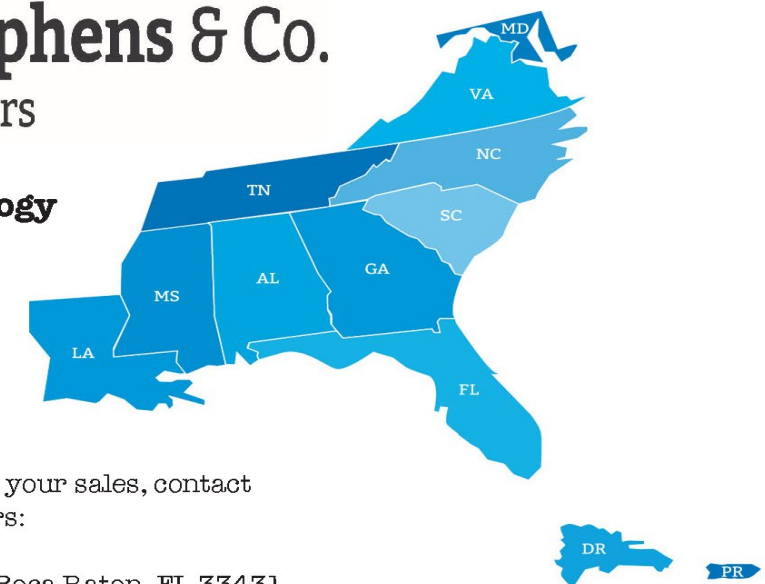
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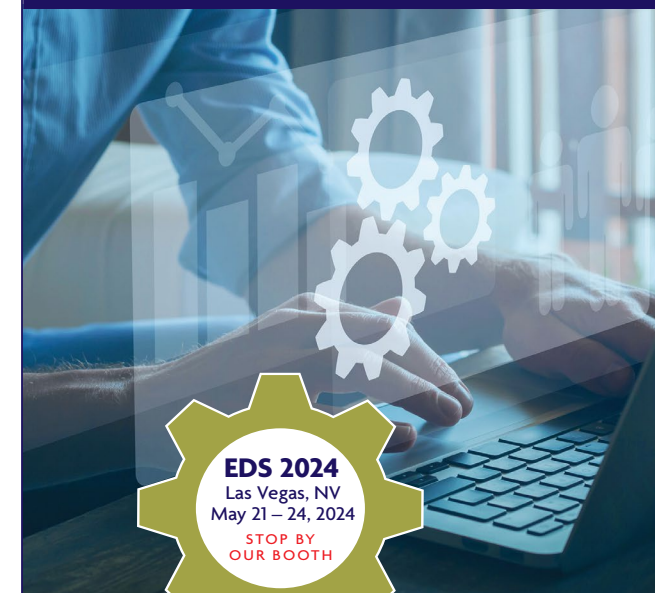
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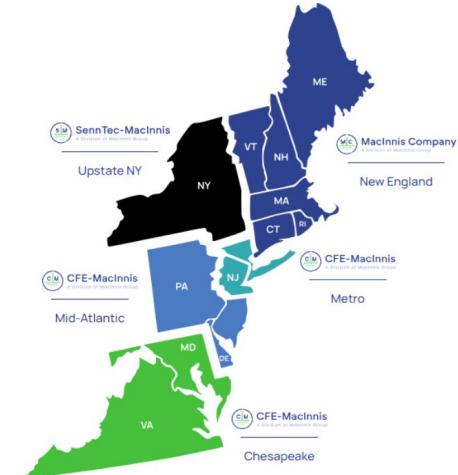
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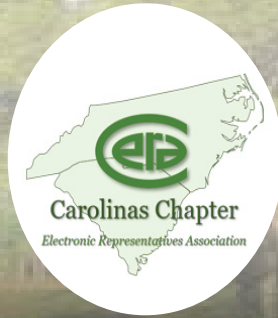
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# THE CAROLINAS ELECTRONICS REPRESENTATIVES ASSOCIATION

extends its deepest gratitude to these generous sponsors of the 2023 CERA 20th Annual Memorial Golf Tournament



**A message from our president, Penny Langdon:** On October 6, 2023, the Carolinas ERA Chapter hosted its 20th Annual Memorial Golf Tournament at The Challenge Golf Club in Graham, N.C. We honored our friend & colleague Keith Phillips from Phoenix Contact. His friends at Phoenix did a heartfelt tribute with a tee sign in his memory. On behalf of CERA, we extend our overwhelming appreciation for our manufacturer, representative and distributor sponsors, as well as numerous volunteers. Proceeds benefited the American Cancer Society as well as two \$1,500 scholarships for college students that are dependents of CERA reps and distributors in the Carolinas.

CERA's 21st Annual Golf Tournament will take place at Wildwood Green Golf Club, Raleigh, N.C. on **Thursday, October 10, 2024**. Wildwood Green's beautiful terrain of rolling greens and woods is a peaceful sight to the eye.

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## ERA XCOM DIGEST

For the past three years, the ERA White Pin Group and ERA National have forged a partnership aimed at growing the pool of talent at manufacturers' representative firms across North America. Together, they have championed the Mark Motsinger White Pin Internship program designed to award three internships annually, serving as a conduit to engage and onboard talented college students as interns, either during the summer or throughout the academic year.

It is with great pride that the ERA White Pin Group unveils the recipients of the 2024 Mark Motsinger White Pin Internships:

- Julie Rowe, Business Marketing major at East Carolina University, interning at Pinnacle Marketing
- Nathan Dubsky, Business Analytics and Entrepreneurship major at the University of Cincinnati, interning at Staffco
- Ethan Bowers, Engineering Management major at the Missouri University of Science & Technology, interning at R.W. Kunz & Associates

These three individuals will start their journeys this spring through immersive 10-week programs. Building on the success of the previous year, Ellen Coan, Walter Tobin and I are excited to host two check-in calls with the rep firm owners and interns throughout the summer, gathering connections and insights. The enthusiasm and energy displayed by last year's interns during these calls was truly inspiring.

Distinguished by their enthusiasm and hailing from top tier colleges, this year's interns represent a shift towards business school majors, diverging from the previous cohort dominated by engineering disciplines. Tasked with a diverse array of responsibilities — including foundational marketing tasks, data analytics, shadowing account managers during customer calls, distributor trainings and industry tradeshow — these interns are poised to experience many of the intricacies of the manufacturers' representative model.

Ultimately, our aim is for these interns to not only grasp the nuances of the manufacturers' representative business but also to develop an appreciation for it. We aspire for them to embrace this dynamic industry and, ideally, forge enduring connections that may culminate in future employment opportunities with their respective representative firms upon graduation.

Mark Bowers, vice president, R.W. Kunz & Associates, summarized the plan with his son, Ethan, well:

"This internship will be structured so our

intern will get a full understanding of how the manufacturers' representative industry is an important asset to its customers, distributors and manufacturers represented. Ethan will learn about territory and account management, outside sales, technology marketing and enhanced communications and gain product knowledge of the design-in process at the engineering level. I look forward to this summer with further hopes that he will join the R.W. Kunz team afterwards."

At the culmination of the 2024 internships, Ellen and I will seek testimonials from the rep owners, undoubtedly bolstering the program's visibility for the upcoming 2025 group of interns.

I ask the entire rep community to earnestly consider participation in this program, as we hope to see even more applications next year. It is important to note that for an application to be duly processed, an intern candidate must be identified by the rep firm. While the ERA and White Pin team stand ready to offer guidance throughout the process, it's imperative to emphasize that the task of finding interns rests with the rep firms themselves. In this regard, we strongly encourage rep firms to liaise with local universities, junior colleges and trade schools, and utilize platforms such as Handshake.com to identify suitable candidates.

For reference, the White Pin Internship program is prominently featured on the ERA website under the section designated as ERA Resources. Here, internship recommendations and guidelines are available for prospective participants.

Dating back to its inception in 1960, the ERA White Pin Group remains a society comprised of like-minded reps who have demonstrated commitment through volunteer leadership roles at the national ERA level for a minimum of two years. Membership to the White Pin ranks expands annually, affording new members the privilege of actively contributing to the internship program among other endeavors. Central to the ethos of the program is its overarching objective of nurturing human talent and facilitating their integration into the successful narrative of our rep firms.

The genesis of the Mark Motsinger White Pin Internship program in 2022 was borne out of ERA's steadfast resolve to acquaint college students with the intricacies of the rep model, while concurrently cultivating a pipeline of fresh, dynamic talent to invigorate the electronics industry. Named in honor of Mark Motsinger, president of Wallace Electronic

## INDUSTRY UPDATE

Kingsland Coombs, CPMR, CSP  
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Sr. Vice President at Large  
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## White Pin Internship update: Spring/Summer 2024



## MEMBERSHIP UPDATE

John Hutson, CPMR  
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Sr. Vice President, Membership  
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**Your customer is not  
that far out of reach—  
let ERA help**



Most would agree that it has never been more difficult to get in front of the customer. Many factors have contributed to this, with technology certainly being one of the more impactful. Ironically, as the means to communicate have become more available and affordable, this has not made the process of getting an audience with our customers any easier.

Education remains a primary pillar in ERA's mission to advance and support the professional field sales function in our industry, and ERA has a long history of identifying changes in our business and defining best practices to help our members excel during times of change. ERA has been tracking how challenging it is to get the attention of our customers for a while now, and they continue to address these challenges by sharing means and methods for helping with this struggle. Helping you get in front of your customer is just one resource that provides you with return your ERA membership. Are you accessing it?

With ERA's assistance, the manufacturers' representative has adapted various tools to help us get in front of the customer, but the most effective continues to be the value in representing multiple manufacturers. Throughout the sales process—demand identification, demand creation and demand fulfillment—having accessibility to all of the resources that multiple manufacturers offer an independent manufacturers' representative provides an invaluable opportunity to achieve “trusted advisor” status with the customer, thus improving the ability to get their attention.

ERA has been working hard to identify tools and tactics for parlaying the tried-and-true multiple line advantage in order to maximize customer engagement, most of which also apply to our manufacturer and distributor members as well. For example, everyone has access to data, and the cost of tools for efficiently analyzing data has come down to the point where it might be a wise investment for all ERA members. Analyzed data is information, an informed salesperson is an empowered salesperson, and an empowered salesperson is better positioned to capture the attention of their customer than the ill-informed. Have you invested in data analytics, incorporated it into your sales strategy, and are you sharing it with your channel partners to maximize customer engagement? Many of your fellow ERA members are, and they are sharing their best practices.

Digital marketing represents a significant evolution in enhancing customer engagement. Historically, marketing communications

(MARCOM) were managed by manufacturers, with distributors co-opting in these efforts. However, as digital communication has advanced and the cost of automated email programs has decreased, reps have gained the ability to effectively market and communicate the benefits of their diverse product lines, thereby increasing direct engagement with customers. This shift allows reps to engage in localized MARCOM activities, fostering a new level of collaboration that significantly boosts customer interaction. Members of ERA are proactively integrating this approach into their sales strategies. Are you on board with this change?

One of the most interesting developments continues to be AI, and here again ERA is here to help. ChatGPT, and any equivalents, continues to advance at a rapid pace. The release of ChatGPT4 was more than ten times more powerful than ChatGPT3.5, and the anticipated release of ChatGPT5 will further impact how we do business. These tools provide our membership with the opportunity to become more efficient and productive across multiple aspects of our business, including how we communicate with our customers. Have you incorporated AI into your organization? ERA is here to help.

ERA's SearchLink.ai may be the best tool to date to help you get in front of your customer. More information is available to us than ever before, but processing such a magnitude of information can be overwhelming. ERA's SearchLink.ai scrubs the internet in a way that allows you to effectively identify valuable information on your customers that improves your ability to engage and capture their attention. A SearchLink.ai subscription is icing on your sales strategy cake. When combined with all of the other resources that ERA is offering our membership, the representative, manufacturer and distributor alike have a toolbox of items that they can use to help them get in front of the customer.

As you can see, ERA continues to help its members adapt to the changes in the industry, especially when it comes to customer engagement. These efforts were recently showcased in Austin, Texas, at the sold-out annual conference, but you don't have to wait for next year's conference to access this information. Most of the ERA chapters are incorporating this content into their local chapter events, both in person and virtual, and you are highly encouraged to attend. Terrific information is also available on the website, or you are welcome to reach out to national to share

*(continued on page 43)*

Often, when I think about pertinent topics for manufacturers, reps and distributors in the electronics industry, I encounter conflicting and occasionally contradictory perspectives. However, thinking about this article, I opted to explore a theme that strikes a personal chord, resonating not only with my own experiences but also with the broader community within the electronics sector. This topic holds relevance amidst the backdrop of recent corporate acquisitions, affecting many individuals across the industry.

Mergers and acquisitions are common occurrences in the electronics industry. When a large corporation acquires a smaller counterpart, it sets off a chain reaction of changes that can profoundly affect employees and corporate culture. This is an attempt to provide observations on the many impacts of such acquisitions on employees and corporate culture and some best practices to navigate through this sometimes-difficult situation.

First, the announcement of an acquisition often triggers uncertainty and anxiety among employees of the smaller corporation. I can certainly sympathize. Concerns about job security, changes in roles and responsibilities and potential layoffs loom large, leading to apprehension and stress in the workplace. Clear and transparent communication from both the acquiring and acquired companies is essential to ease the fears and provide clarity regarding the future direction and implications of the acquisition.

After the acquisition, there are typically changes in the organizational structure and reporting lines as the two companies integrate their operations. This can result in the consolidation of departments, realignment of teams and reshuffling of management roles. Employees may find themselves reporting to new supervisors or collaborating with colleagues from the acquiring company, necessitating adaptation to new working dynamics and corporate cultures.

One of the most significant challenges is integrating differing corporate cultures. The acquiring company may have distinct values, norms and operating practices that differ from those of the smaller corporation. This can lead to cultural clashes, resistance to change

and difficulties in fostering a cohesive and harmonious work environment. There must be efforts made to bridge cultural gaps, promote open dialogue and cultivate a shared sense of purpose as essential to successful integration.

Despite the challenges posed by these acquisitions, there are also opportunities for growth and development for employees. The resources and expertise of the larger corporation can provide access to innovative technologies, markets and career advancement opportunities. Through training programs, mentorship initiatives and cross-functional collaborations, employees can enhance their skills, expand their professional networks and thrive in the post-acquisition environment.

Maintaining employee morale and engagement during and after an acquisition is the most important factor to the long-term success of the integrated organization. Recognizing and addressing the concerns and needs of employees, fostering a sense of belonging and empowerment and celebrating milestones and achievements are crucial steps in preserving morale and motivation. Leadership transparency, empathy and responsiveness are essential in building trust and fostering a positive workplace culture amidst change.

In conclusion, when a large corporation purchases a smaller counterpart in the electronics industry, the impacts on employees and corporate culture are significant. From uncertainty and anxiety to opportunities for growth and development, navigating the complexities of corporate acquisitions requires careful planning, effective communication and a commitment to preserving employee well-being and engagement. The success of mergers and acquisitions (M&A) goes beyond financial considerations; it depends significantly on the careful management of human factors. Recognizing and addressing the impact on employees is vital for a seamless transition and long-term success. Retaining talent through positive experiences, recognition and career development opportunities ensures that the workforce remains committed and engaged.

By prioritizing transparency, collaboration and cultural integration, companies can successfully navigate the

*(continued on page 43)*

## MANUFACTURING UPDATE

Ken Bellero  
Schaffner EMC  
Sr. Vice President/Manufacturers  
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**From the inside:  
Navigating corporate  
acquisitions and the  
effect on employees and  
corporate culture**



**EDUCATION UPDATE**

Ellen Coan, CPMR  
C C Electro Sales  
Sr. Vice President/Education  
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**Conference takeaways  
will provide value to our  
customers**



Identity theft, email hacking, phone scams, phishing emails, etc. — from creative people who should use these skills to improve our lives instead of disrupting them. But we have to stay ahead of them and put in the effort daily to learn new technology to avoid these situations and be more productive and creative in ways we didn't know existed.

In February 2024 in Austin, Texas at ERA's annual conference we shared several breakout sessions to address these technologies. Craig Jackson, deputy director at the Indiana University Center for Applied Cybersecurity Research, presented cybersecurity research and best practices for your company's CISO (chief information security officer)—who knew you needed one? We learned about awareness training for employees, cyber insurance and the infancy of that product, and password keeper apps.

Then there were the AI presentations from our industry experts, Sam Richter and Matthew Amato, who gave us a lot to think about, from avatars that imitate us to productivity enhancements that allow us to keep doing more, better and faster!

For me, it came down to prompt engineering and experimenting with Gemini (the new Bard from Google) and Chat-GPT4, but there are others as well, and additional plug-ins to improve the experience. It was a deep rabbit hole, but time well spent. From there I went to read.ai and Otter to help with meeting transcripts and action item management. Just like the Internet, I do not believe this will replace any of us, but it will help make us more efficient and creative. Education and networking are the best conference takeaways!

Look for more tools and best practices at ERA's STEP (Sales Training for Electronic Professionals) on Sept 24-26, 2024—three days of virtual training (manageable schedule over all time zones with time to address real-time business issues) on relevant topics for our day-to-day best practices to provide value to our customers.

Together we are better! ■

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# Rep goes toe-to-toe with manufacturer — and wins every round



by Adam Glazer  
ERA General Counsel

*Adam J. Glazer is a partner in the law firm of SFBBG and serves as general counsel to ERA. He is also a regular contributor to The Representor, and participates in Expert Access, the program that offers telephone consultations to ERA members.*

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Promoting the sale of electrical insulation used in power transmission and distribution lines is undoubtedly a seductive enough field all by itself. But mix in a lawsuit over unpaid commissions and a flailing attempt to dismiss it, and soon, the same way sex and violence sells movie tickets, the enchantment with electrical insulation sales becomes palpable.

The electrical insulation sales channel can be viewed as a boxing ring, and in one corner stands the manufacturer, Sediver USA, Inc. In the other corner is the challenger, independent manufacturers' rep D'Ewart Representatives, LLC. Here's the tale of the tape.

## After getting knocked down, the rep counterpunches

The parties entered into a series of sales rep agreements that were, as is so often the case, heavily tilted in the manufacturer's favor. D'Ewart served as the Northwest rep until getting flattened by Sediver in January 2022. While Sediver had the contractual right to terminate, D'Ewart claimed it underpaid certain commissions due and altogether failed to pay other commissions.

To collect these commissions, D'Ewart filed suit in the federal court in Seattle asserting breach of contract and violations of the Washington Sales Representatives Act. (As an aside, most states have sales rep statutes, and unfortunately for D'Ewart, Washington's is among the weakest, providing for no exemplary damages.)

## The manufacturer seeks a "TKO"

Sediver fought back by moving to dismiss D'Ewart's complaint. Motions to dismiss are typically raised at the beginning of the case before the parties engage in the discovery process, where evidence is gathered to support their positions. Accordingly, the standard to prevail on a motion to dismiss is quite high, essentially requiring Sediver to score a

knockout to prevail on its motion.

Its motion argued that the allegations of underpayment were implausible when the 1 percent sales commission at issue was properly paid as a split commission. "But this is not so clear to the Court," ruled Judge John C. Coughenour, because the formula used by Sediver depended on unexplained "territorial considerations."

In actuality, it appeared Sediver inferred from the contract that a 1 percent rate "best captured the project's territorial implications." The judge, however, ruled "it is black letter law" that he cannot rely on inferences to grant a motion to dismiss.

Undeterred, Sediver took another shot. Relying on the agreement's pro-manufacturer terms, Sediver pointed to its contractual right to unilaterally set the applicable commission rate.

A contract provision such as this should give all reps pause. Consider how the parties agreed on specific commission rates in their agreement, but another clause tucked into the same document gave the principal the right to undo the agreed-upon rates and set a new rate all by itself. Suffice it to say reps are well-advised to keep such terms out of their contracts to the extent possible.

## The ref breaks up the clinch

Fortunately, in Washington state, like in most states, contracts are subject to an implied duty of good faith and fair dealing. This meant Sediver was required to exercise its right to set the commission rates in a good faith manner. The complaint pleaded that Sediver violated this duty, and that was enough for Judge Coughenour, who ruled Sediver cannot rely on this unilateral contract right for purposes of a motion to dismiss.

## On to the next round

Unable to knock down the contract claim,

*(continued from previous page)*

Sediver launched some haymakers at D'Ewart's sales rep act claim. After a termination, the Washington rep statute requires principals to pay all earned commissions due within 30 days of receiving payment, and to pay all commissions that the rep was responsible for regardless of when the sale occurs. Unlike most other state statutes, Washington's does not include a provision awarding double or treble damages upon a violation.

D'Ewart apparently invoked the statute merely to provide an alternative cause of action against Sediver, and not because it offered any greater relief. Yet, Sediver still jabbed away, based upon the statutory language limiting its application to a sales rep who solicits wholesale orders. Sediver claimed the complaint pleaded the parties' sales relationship was not a wholesale one. Again, the Court read it quite differently, finding Sediver's argument "ignores allegations contained in the Complaint and the agreement's plain terms." The judge refused to entertain an argument "based on nothing more than Defendant's version of the facts here."

In a "final salvo" against the Washington rep statute, Sediver argued it should not apply because the parties' most recent agreement predated its effective date. And indeed, the parties' contract states it was "dated as of August 8, 2019," well before the statute's June 11, 2020 effective date. D'Ewart, however, actually signed the agreement on September 20, 2020, months after the relevant terms of the sales rep act took effect.

## Trying to fight closer to home

Sediver's final blow involved changing tactics. If it couldn't prevail in seeking a dismissal, Sediver wanted to fight in a more convenient ring and sought to transfer the action from Seattle to Little Rock, Arkansas. To do so, Sediver invoked what it referred to as the rep contract's "forum selection clause."

When parties agree in a contract to a provision mandating that disputes get litigated in a specific forum, courts will usually enforce these terms. Such clauses must make a designated forum as the exclusive venue, not an optional venue, to be taken seriously.

The term that Sediver pointed to in its contract with D'Ewart hardly used mandatory language. Instead, it read: "jurisdiction and venue in the courts governing Arkansas shall be appropriate for any and all matters and disputes arising" under the contract. "Appropriate" and "exclusive" are not even cousins. In the words of Judge Coughenour: "In the Court's view, this is permissive—not restrictive. It provides that an Arkansas court may be used—not must be used."

The action remained in Seattle, where D'Ewart would get its day in court. Rather than score the knockout it needed to escape D'Ewart's allegations of withholding commissions due, Sediver got pounded on its motion to dismiss, losing every round.

D'Ewart would live to fight another day in its battle to get fairly paid. ■

# Tax-free benefits to help business owners attract and retain employees



by J. Christian Manalli  
Partner, SFBBG

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Lack of familiarity with fringe benefits can cause business owners to overlook tax-free perks and incentives they could be offering to prospective hires or providing to their current employees (and their spouses and dependent children) at minimal cost. The following article provides a summary of the federal income tax treatment of certain fringe benefits that business owners may want to consider to help attract and retain employees.

Cash payments, bonuses, salary and hourly wages received by an employee are obviously taxed as employment income which must be reported by an employee on his or her federal income tax return. However, under Section 132 of the Internal Revenue Code of 1986 (the “Code”), an employee is generally not required to report as income any employer-provided benefit that falls into one of the following categories: (1) no-additional-cost services; (2) qualified employee discounts; (3) working condition fringe benefits; (4) de minimis fringe benefits; (5) qualified transportation fringe benefits; (6) qualified moving expense reimbursements; (7) qualified retirement planning expenses and (8) reciprocal agreements.

If a benefit does not qualify under one of these exemptions or if the exemption is suspended (for example, qualified moving expense reimbursements and qualified bicycle commuting reimbursements are currently suspended until 2026), the employee must include it in his or her gross income.

**No-additional-cost services.** A service provided by the employer to the employee at no-additional-cost to the employer may be excluded from tax: (i) if it is the same type of service or property that the employer offers for sale to its customers in the ordinary course of business, and (ii) if it is the same type of service or property offered for sale in the line of business in which the employee works. Examples are hotel accommodations, transportation by aircraft, train, bus or cruise line and telephone services. Certain retired and disabled employees and the surviving spouses

of employees are also treated as employees for purposes of this fringe benefit.

**Qualified employee discounts.** Employers may find it helpful to attract and retain employees by making various goods or services available to their employees at a discount. Often such benefits require the employer to only forego part of the potential profit margin. However, the exclusion does not apply to the following products or services: (i) real property, (ii) property of a kind ordinarily held for investment or (iii) property or services not offered for sale to customers in the ordinary line of business of the employer in which the employee is performing service.

Second, there is a limitation on the size of the discount. For services, the maximum excludible discount is 20 percent of the price at which the employer offers the service to nonemployee customers. For products or merchandise, the maximum excludible discount is the employer's “gross profit percentage.”

Gross profit percentage is defined to be the excess of the aggregate sales price of products sold to nonemployee customers over the aggregate cost of the property, divided by the aggregate sales price. This is generally calculated using the employer's tax year immediately prior to the tax year in which the discount is available. The employer considers all products offered for sale to customers (including employees) in the line of business in which the employee performs services or some other reasonable classification of merchandise. Because the calculation takes into account aggregate sales, the employer need not make a profit on the specific item or product sold to the employee in order to qualify for the exclusion. As is the case for no-additional-cost services, certain retired and disabled employees and the surviving spouses of employees are also treated as employees for purposes of this fringe benefit.

**Working condition fringe benefit.** The working condition fringe benefit exclusion recognizes that external factors impacting an employee's work environment can be directly

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related to the employee's ability to perform the job required. A working condition fringe benefit is defined as “any property or services provided to an employee to the extent that, if the employee paid for such property or services, such payment would be deductible as an ordinary and necessary trade-or-business expense (or as depreciation) under Code Sections 162 or 167. Typically, under Code Section 162, items such as computers, vehicles, office space, support staff, tools and supplies are deductible. Therefore, to the extent that such items have been provided by the employer and serve the purpose of getting the employee's job done, they will fall within the exclusion.

**De minimis fringe benefit.** Any property or service provided to an employee qualifies as a de minimis fringe benefit if the fair market value of the property or service is so small that accounting for the cost of the property or service would be unreasonable or administratively impracticable. To determine whether the fair market value of the property or service provided is sufficiently small, the frequency with which similar fringe benefits are provided by the employer to all employees must be considered, together with other relevant factors beyond the scope of this article.

An employee's personal use of an employer-provided cell phone offers an example of how the de minimis fringe benefit exclusion can apply in tandem with the working conditions fringe benefit. If a cell phone is provided to an employee primarily for business reasons, the employee's use of the cell phone for business reasons is treated as a working condition fringe benefit, and the value of the cell phone usage will be excluded from the employee's wages. Furthermore, the employee's personal use of the same phone is excludible from the employee's income as a nontaxable de minimis fringe benefit.

**Qualified transportation fringe benefits.** As part of the 1992 Energy Act, Congress sought to provide a tax incentive for employees to use mass transit for commuting. Accordingly, the following categories of fringe benefits qualify for the qualified transportation fringe benefit exclusion: (1) transportation in a commuter highway vehicle if the transportation is in connection with travel between the employee's residence and place of business, (2) a transit pass, (3) qualified parking or (4) a qualified bicycle commuting reimbursement. Note, however, that qualified bicycle commuting reimbursements must be included in income for tax years 2018 through 2025, and the exclusion from gross income is not available to self-employed individuals.

There are two separate limitations for purposes of determining the amount that is excludible from gross income: (1) transportation in a commuter highway vehicle and transit passes are subject to one combined limitation, which is currently \$315 for tax year 2024; and (2) qualified parking is subject to a separate limitation, which is also \$315 for tax year 2024. The statutory monthly limit on the value of the benefits from each category is adjusted for inflation on an annual basis.

**Qualified moving expense reimbursements.** Unfortunately, qualified moving expense reimbursements are not excluded from income for tax years 2018 through 2025, except in the case of certain military relocation expenses. However, in 2026, any amount an individual received from an employer as a reimbursement for moving expenses for relocating their home in order to work (and which would be deductible as an employee moving expense if the individual paid or incurred the expenses directly), qualify for exclusion from the employee's income. However, because these amounts could be deducted by the employee on his or her own tax return, it is important to note that the exclusion does not apply to any employer reimbursement for an expense which the employee deducted in a prior tax year.

**Qualified retirement planning services.** Employers who provide a “qualified employer plan” to employees may also provide retirement planning services to their employees and their spouses, and such services are excluded from the employee's gross income. A “qualified plan” refers to employer-sponsored retirement plans that satisfy requirements in the Code for receiving tax-deferred treatment. Most retirement plans offered by employers qualify, including defined contribution plans (e.g., 401(k) plans) and defined benefit plans (e.g., pensions).

**Reciprocal agreements.** Reciprocal agreements are written agreements between employers to provide fringe benefits for each other's employees. These agreements allow the benefits provided by employer A for the employees of employer B (and vice versa) to qualify for the exclusion if the services are provided pursuant to a written agreement and neither of the employers incurs any substantial additional cost (including lost revenue) in providing such services. For example, an agreement between two different retail stores to provide employee discounts to each other's outlets. Special rules apply to on-site parking and athletic facilities located on an employer's premises.

In addition, while this article summarized the basic fringe benefits a business owner can provide to employees and certain members of their families tax-free, additional types of benefits, including educational assistance plans, dependent care assistance plans and adoption assistance plans, are also available. Business owners knowledgeable of these tax-free benefits will undoubtedly have an edge in hiring prospective applicants and incentivizing existing employees. ■



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The Florida-Sunshine ERA Chapter promotes and advances the growth and professionalism of our members through education, networking, peer discussion groups and service to our customers and community.

For details on Florida-Sunshine ERA, visit [erasunshine.org](http://erasunshine.org).

**SOMEONE YOU SHOULD KNOW: Mallerie Merchant**

*(continued from page 10)*

taste of business interactions. Spending time with industry leaders inspired me to dream big and set lofty goals for my career. It showed me the many possibilities of entrepreneurship and inspired me to pursue this path.

These interactions, and the stories of industry leaders, have also taught me a lot about perseverance in business and the need to be constantly evolving and integrating. The ERA organization is so valuable in many ways, but for me, the facilitation of collaboration and sharing of knowledge between businesses is particularly special. ■

**XCOM DIGEST: Industry update**

*(continued from page 33)*

Sales and esteemed executive director of the ERA White Pin Group for more than 16 years, the program stands as a testament to his enduring legacy. Motsinger played a pivotal role in shaping the educational trajectory of the White Pin Group, spearheading initiatives aimed at propelling the recruitment and assimilation of recent college graduates into our industry. ■

**XCOM DIGEST: Membership update**

*(continued from page 34)*

your ideas and needs in order that we may strive to assist.

With ERA membership, your customers may not be as far out of reach as they appear. When we utilize all the tools available to us, and work collectively towards this goal, improving our presence with our customers can be achieved. ■

**XCOM DIGEST: Manufacturing update**

*(continued from page 35)*

challenges and realize the potential benefits of acquisitions, driving long-term value and success in the dynamic landscape of the electronics industry.

For me it is important to remember that our greatest asset lies in the dedication and talent of our workforce, and by nurturing these, we pave the way for sustained success and innovation in the electronics industry and overcome the challenges created by a corporate acquisition.

As always, if you would like to reach out to me directly to discuss this topic or any others that are pertinent to our industry, please do not hesitate to email me at [ken.bellero@schaffner.com](mailto:ken.bellero@schaffner.com) or give me a call at 732-910-1717 anytime! ■



*Chapter News reports the local activities of the 22 chapters of ERA. The chapters sponsor educational and training workshops, local trade shows, legislative and industry projects to enhance the professionalism of individual members and to advance the goals and mission of the national association.*

**CHAPTERS OF THE YEAR AWARDS**

At its annual Conference, held Feb. 25–27 in Austin, Texas, ERA announced the Chapters of the Year award recipients for 2023 chapter activities. There were more than 17 entries submitted this year from nine difference chapters (a record!) The awards were based on four categories: education, networking, marketing and special projects.

The award recipients were:

**Education:** Southern California ERA for its virtual event “Explore Your Future with AI Language Models,” featuring speaker Matthew Amato, IBS Electronics.

**Networking:** New England ERA for its young industry professionals networking happy hour in June at SPIN, a ping pong social club in Boston.

**Marketing:** Ohio ERA for its baseball game outing in May to reignite the chapter and recruit additional members to join the Chapter Executive Board and planning committee.

**Special Projects:** Canada ERA for its November to Remember dinner gala in support of Hospital for Sick Children’s toy drive.

Congratulations to all of the recipients and to all the chapters who submitted events for judging!

**ARIZONA**

Arizona ERA is excited to be hosting its 3rd Annual Golf Tournament on Wednesday, May 29 at Legacy Gold Club in Phoenix. The event is open to reps, distributors, principals, friends and family and the chapter looks forward to a great turnout.

The chapter is also working to coordinate a breakfast or lunch event for current non-members/prospective members to present to them the benefits of joining ERA in hopes of gaining new members.

**CAROLINAS**

Carolinas ERA is gearing up for a busy year ahead! The chapter’s annual DTAM report was presented virtually in March. The chapter would like to extend many thanks to the distributors who take the time and effort to provide their numbers for the report.

The chapter will soon be announcing a roster of great topics for its ongoing virtual networking events.

Plans are already underway for the chapter’s Annual Charity Golf Tournament in the fall. Stay tuned for more information to come! It will be an exciting year with chapter community!

**CHICAGOLAND-WISCONSIN**

Chicagoland-Wisconsin ERA hosted back-to-back virtual chapter meetings in February and March to kick off 2024.

At both meetings, Bradley Gauthier, CEO and founder of Sitecast, shared his expertise on leveraging ChatGPT and other AI tools to enhance sales processes, drive efficiency and unlock new opportunities. Brad provided a live demo of how to navigate and use ChatGPT as a sales tool. These discussions provided valuable insights and practical take-aways for all attendees ranging from seasoned industrial professionals to those just beginning their journey in the electronics industry.

For those interested in seeing what Brad had to share with the chapter, both session recordings are posted on the chapter’s YouTube channel, which can be found at: [https://www.youtube.com/@chicagoland\\_wiera](https://www.youtube.com/@chicagoland_wiera).

**EMPIRE STATE**

Empire State ERA hosted its annual DTAM and Market Study in March at Del Lago Resort and Casino. The event featured Dennis Reed from Edgewater Research in combination with 20+ years of DTAM data compiled and analyzed by the Empire State chapter team. The event was attended by reps and distributors with interactive discussions on macro-economic trends and impact to the local marketplace. At this event, Empire officers recognized Rick Wray as the outgoing DTAM chair who has been an exemplary steward of this signature event and its value to membership. The event was dedicated to the memory of Chuck Tanzola, long-time Empire Chapter leader and stalwart servant to the local electronics community.



**FLORIDA-SUNSHINE**

Florida-Sunshine ERA hosted its annual DTAM review meeting in April at Tusawilla Country Club. The guest speaker was Matthew Amato of IBS Electronics. Matthew presented a session on artificial intelligence and digital marketing. The chapter will follow that with an educational class in May where Matthew will spend an entire hour sharing his expertise. If you care to attend the May event, please reach out to Greg Warren at [gwarren@brandel-ste-phens.com](mailto:gwarren@brandel-ste-phens.com).

**INDIANA-KENTUCKY**

Indiana-Kentucky ERA hosted a lunch meeting in March. Rolls Royce spoke to chapter members about the Cybersecurity Maturity Model Certification (CMMC) program that is aligned to DoD’s information security requirements for DIB partners. It is designed to enforce protection of sensitive unclassified information that is shared by the Department with its contractors and subcontractors. Many contract manufacturers are certifying to these requirements and in Indianapolis DivAero is complying to Level 2.0.

**MICHIGAN**

Michigan ERA started hosted coffee meetings and sharing best practices in 2024. This activity is bringing all three legs of the stool together—manufacturers’ reps, manufacturers and distributors—and generating a Michigan electronic components community that clearly wants to give back. The chapter’s previous meetings yielded the primary idea of how it will support local charities while also developing content that will attract customers, next generation contacts from manufacturers’ reps, manufacturers and distributors and industry leaders to underpin its objectives.

A chapter event in April focused on a discussion around generating and managing leads through various CRM techniques. The chapter is active and open to anyone wanting to attend. Reach out to [matt.cohen@ccelectro.net](mailto:matt.cohen@ccelectro.net) if your firm is interested in joining the chapter.

**MINNESOTA**

Minnesota ERA hosted its first in-person event of 2024 on May 1. The event took place at Nine Mile Brewing in Bloomington, Minn., and featured a presentation by special guest speaker, Walter Tobin, CEO of ERA. Walter presented all of the latest updates on ERA National. The chapter members enjoyed having this opportunity to network with fellow industry members and build connections.

**OHIO**

Ohio ERA hosted a special in-person distributor panel event in mid-April. This event offered attendees a chance to learn more about local distribution partners and best ways to work with them at the customer level. This was a valuable opportunity for chapter members to network and hear directly from local distributors. The panel was comprised of Mark Counts, branch manager at Hughes-Peters, Bill Furey, field sales rep at Arrow Electronics, and Steve Kemer, general sales manager at Future Electronics. The chapter thanks the panelists for sharing their time and insights!

**NORTHERN CALIFORNIA**

Northern California ERA hosted its annual kickoff meeting in January at Maggiano’s Restaurant in Santana Row. The annual event set the stage for a year of upcoming events, volunteer opportunities and collaboration. Forty members attended with lively conversations being had. A focus on inclusion and growth of the local chapter was a highlight of our event. As attendees mingled over delicious Italian cuisine, the spirit of camaraderie and enthusiasm filled the air, laying a strong foundation for continued success in the dynamic Northern California electronics landscape.



**SOUTHERN CALIFORNIA**

Southern California ERA kicked off February with a bang, hosting the 2nd annual Rock N’ New Year Social, where they welcomed electronic industry “rockstars” for an evening of networking and celebration. It was truly a night to remember, with record sponsorships and attendance. Attendees joined the event to expand their network, explore career opportunities and unwind with fellow industry enthusiasts while ringing in the New Year. The chapter is thrilled to announce an exciting addition to its event offerings for 2024: The Microsoft Office 365 all access training pass. This pass grants unlimited access to monthly Microsoft Office 365 training for chapter members, ensuring they stay ahead in their skills and productivity.

In January, the chapter dove into all Office 365 products available, including a significant update on the phase-out of the traditional Outlook Desktop user experience by the end of 2024. In February the chapter studied the world of Microsoft Teams and learned how to effortlessly schedule meetings, chat with colleagues and make calls. In March, members discovered the file sharing, planner and forms features and other integrations for streamlining productivity.

SoCal ERA members should save the date for future Microsoft Office 365 trainings on 6/18, 7/16, 8/27, 9/12, 10/15, 11/19 and 12/12. The topics will be announced closer to the event dates.

On June 4, the chapter’s San Diego Social will take place from 5:00-7:30 p.m. PT. This is a free event for those in the electronics industry, due to the event’s amazing sponsors. This is a fantastic chance to connect with members in your local area. Visit [www.erascal.org](http://www.erascal.org) for more information. ■

**SAVE THE DATE  
FOR STEP**

ERA's STEP (Sales Training for Electronics Professionals) will return this fall from Sept. 24-26, 2024, and will offer electronics professionals a chance to take a "step" up in their careers and sharpen their skills. This live, virtual training, sponsored by TTI Family of Specialists, will include an array of useful topics and be conducted by a mix of professional sales trainers and electronics industry experts. Stay tuned for information throughout the summer regarding registration information and a program agenda.

Past training recordings are now archived and available for purchase on the ERA website, for those who did not attend live training in 2021, 2022 or 2023. Visit [era.org/step](http://era.org/step) for more details.

**ERA ANNOUNCES  
RECIPIENTS OF 2024  
WHITE PIN INTERNSHIPS**

The ERA White Pin Group is pleased to announce the recipients of the 2024 Mark Motsinger White Pin summer internships: Julia Rowe, business marketing major at East Carolina University, interning at Pinnacle Marketing; Nathan Dubsy, business analytics and entrepreneurship major at the University of Cincinnati, interning at Staffco; and Ethan Bowers, engineering management major at the Missouri University of Science & Technology, interning at R.W. Kunz & Associates.

This is the third year that the ERA White Pin Group and ERA National have partnered to award three internships to manufacturers' representative firms in various regions across North America to help hire and onboard college students as interns during the summer or academic year. Congratulations to these rep companies and the interns!

**ERA AWARDS LIFE  
MEMBER RECOGNITION  
TO TWO ERA MEMBERS**

In February 2024, ERA awarded Life Member recognition to John Jacobsen of Jacobsen Associates, Inc. (Mid-Atlantic Chapter) and Steve Wolcott of Norcom, Inc. (Southwest Chapter).

ERA congratulates these two individuals on their Life Member status and recognizes the extraordinary time, talent and effort they have dedicated to ERA and the manufacturers' rep function within the electronics industry. ERA Life Members are individuals who have been employed by or associated with one or more firms as members in good standing of the association (regular, at-large or international) during a 20-year period, and are nominated by fellow chapter members at biannual ERA Board meetings.

**ERA WILL ATTEND  
ELECTRONICA 2024 IN  
MUNICH**

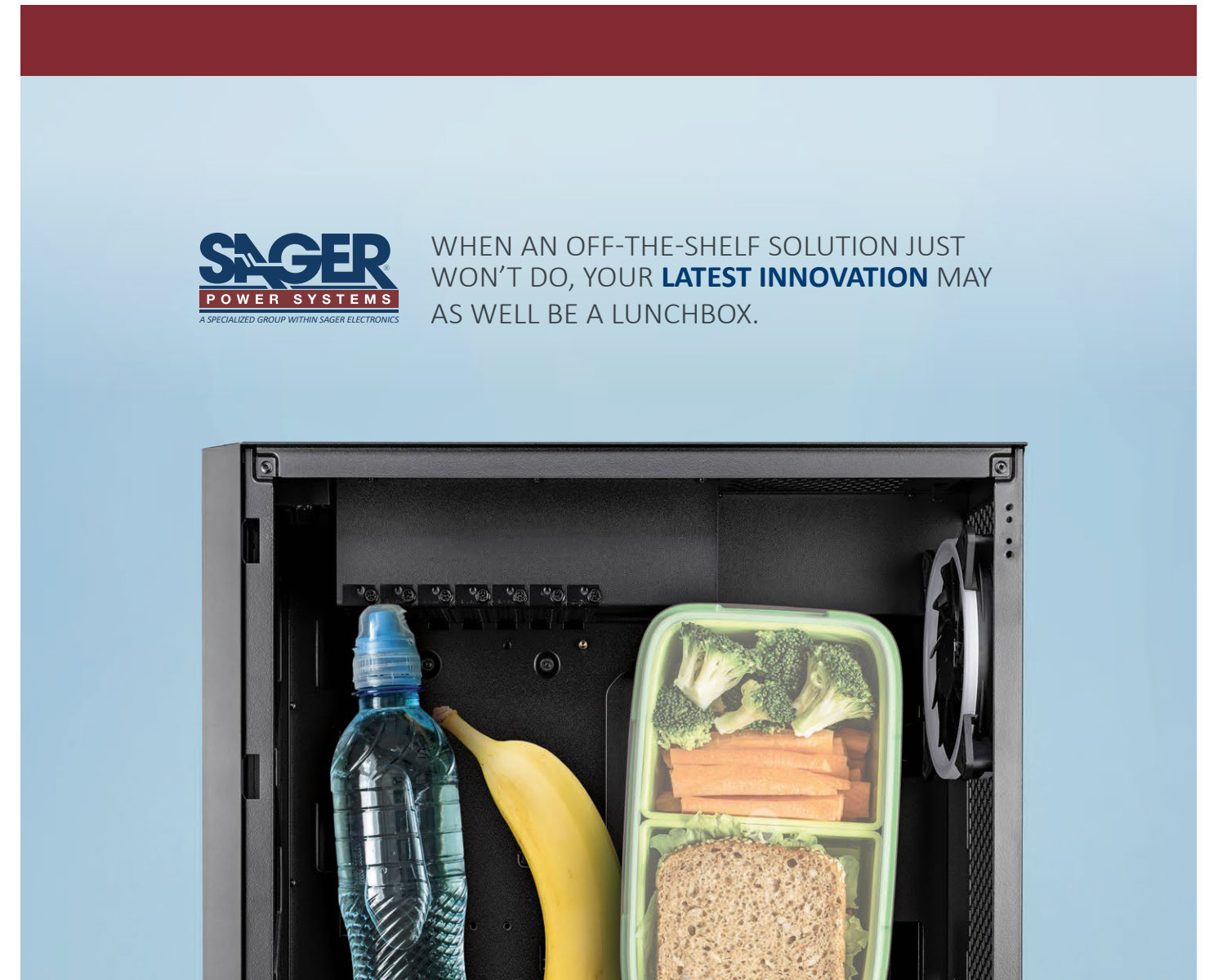
ERA is proud to be counted among the many exhibitors that will attend electronica 2024, a premier international electronics industry tradeshow and conference in Munich that will bring together companies from more than 50 countries. This year electronica will take place November 12-15 and is celebrating its 60th anniversary of the event.

The show's 16 exhibition areas will cover the entire spectrum of technologies, products and solutions in the electronics industry across all sectors, from semiconductors and components to assemblies and systems.

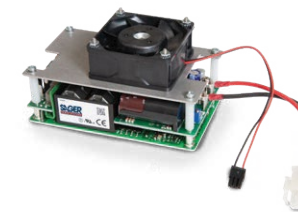
"Electronica 2024 affords our members a unique opportunity to get updated on the latest technology announcements from hundreds of electronic manufacturers from all over the world," said Walter Tobin, CEO of ERA. "ERA is proud to introduce these global manufacturers to our attending members from the Americas and help them navigate their sales and marketing plans into the Americas' markets. In addition, many manufacturers are looking to learn more about the Americas non-stocking manufacturers' rep model and how manufacturers' reps can help expedite their global sales strategies."

ERA has been attending electronica for more than 22 years. ERA's goals when attending electronica are: to advocate for ERA's North American members who are looking for representation and/or channel solutions in EMEA (Europe, Middle East and Africa) territories; and to provide information about the North American rep model to manufacturers in EMEA who are interested in rep coverage and/or channel partners in North America.

Please plan to visit the ERA booth (booth information to be announced) to say hello, charge your electronics and use ERA's private WI-FI to remain in touch with your customers. Read more about the event at [electronica.de/en/trade-fair](http://electronica.de/en/trade-fair). See you in Munich! ■



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