



# Operating As Eyes And Ears In The Field

If the partners that make up the ownership of Dynamic Bulk Systems, Inc. (DBS) thoroughly understand the role of the independent rep in the field, they equally understand how important it is to communicate that role to their manufacturers and customers.

**B**ob Baker, president of the Fenton, Missouri-based rep firm, offers this overview of how he and his agency see the role of communication in their business: "Communication between manufacturers' representatives and their principals is the single most important factor in determining the success of their relationship and the overall success of the promotion and the sale of their product to the marketplace.

"We maintain constant communication with our principals via phone, fax, e-mail and personal visits. The amount and quality of communication with our principals has been a great barometer in determining how we are succeeding in promoting and selling their products. For example, we

have great communication with our inside sales contact at MAC Equipment, a key principal for us. As a direct result, our sales of MAC Equipment components have been excellent. We believe this has been a significant factor in our success."

Just as important as communicating and keeping the agency name in front of principals is the need to keep it in front of customers. In that venue, according to Baker, DBS follows an equally aggressive course. "In addition to the regular ads in trade journals, organization newsletters and show programs, we have developed a large variety of handouts, booklets, charts, giveaways and useful/quick reference guides for our customers and targeted markets/users of the equipment we sell."



*Left to right: Steve Brown, Bob Baker and Dave O'Brien of Dynamic Bulk Systems, Inc.*

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### Simple Communication Tools

He continues, "We serve many types of customers and have developed specific 'tools' for them. If they use the item, our name is right in front of them on a daily basis. The trick is to make it easy to use, make sure it's something they need to reference on a regular basis, and present it in the simplest format possible." One of the tools DBS offers are charts outlining the information their customers say they use most. He explains that through interaction with customers, DBS has developed charts that include:

- Dust Collection Made Simple.
- Pneumatic Conveying Quick-Sizing Guidelines.
- Fan Laws & Formulas/Drive

Arrangements/Rotations for Centrifugal Fans.

In addition, he continues, their old standby line card presents specific information on the agency's principals, but was designed with key engineering information that includes properties of air, material handling properties, tubing dimensions, pipe dimension, and others.

In a period of a little over a decade, DBS has developed and

followed a solid foundation of communication that has served the agency well on all fronts. It's a philosophy, however, that didn't develop by itself.

Baker, together with equal partners Steve Brown and Dave O'Brien, opened the doors to their agency in 1992, after the three had spent time working together at another company. Today, the agency is one of the largest in the industry, with 12 employees. Ac-

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cording to Baker, "We sell industrial equipment that produces everything from 'food to rocks.'"

The industrial equipment he speaks about is made by 10 major companies and sold to businesses of all sizes in eastern Missouri, southern Illinois and western Kentucky. The machinery produces items as diverse as beer, pet food, aspirin, charcoal, plastics, silicon sand, pool chemicals, and fertilizer. Most of the companies DBS represents are more than 50 years old and two are more than a century old. The products made by these companies include pneumatic conveying systems; mechanical conveyors; storage, discharging, feeding and screening systems; level and weight measurement; air movement systems; and process equipment.

Given the variety of principals and customers the agency works with, it's incumbent upon DBS to stay in close touch with all of their constituencies. It's in that area of communication that Baker, Brown, O'Brien and the entire agency are especially aggressive.

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### A View of Call Reports

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An integral part of communication — for better or worse — for many reps is the "call report." When that subject is raised, Brown is quick to note that "in the 12-plus years we've been in business, we have never been asked by a principal to submit any type of regular call reports. What we do on a routine basis, however, is provide lead follow-up information and status summary reports on any open proposals to most of our principals."

The partners note that they're aware of situations where principals have emphasized the desire to have formalized call reports. Their reaction to such reports is described by Baker: "Again, this has never been an issue with us; however, I believe that most representatives in our type of business would strongly oppose such a request. The representative is typically an independent firm. If the bottom-line performance is not meeting the needs of the

manufacturer, if there is no demonstrated action to improve the promotion and sale of the product, and communication on the 'as-needed' basis is not sufficient, I do not think mandatory call reports will help improve the situation. Instead, it may tend to drive a wedge between the two parties. The key to this issue is not the paranoia, it is the time. Any amount of time spent on reports and follow-ups is usually time away from communicating with existing and potential customers and/or planting seeds for future sales growth."

In response to the question, "Is it better/more effective to have reps communicate on their own schedule with principals vs. being pressured to submit reports?" Baker maintains, "I think a combination is best. Each party should feel comfortable in calling the other to discuss a particular situation or just to get a feel for how business is going. For a manufacturer to request a status of all open proposals is fine. There is, however, a distinction between providing updates via a summary report and daily call reports."

While the type of communication DBS practices has proven to be especially effective for rep and principals alike, other means of communication also come into play between the two. According to Baker, "How, when and why we communicate will depend upon the situation. For instance, when an immediate decision is required, nothing can replace a direct conversation, usually via phone. E-mails also are invaluable as they can document correspondence in a very timely manner and can keep a 'log' of a pending situation."

Where the rubber truly meets the road (i.e., the actual exercise of keeping principals informed of

### The Dynamic Bulk Systems File

- Location: Fenton, Missouri
- Established: 1992
- Joined MANA: 1993
- Products sold: Specializing in engineered application, sales of industrial equipment, including dry bulk material handling equipment, air pollution control/movement, noise reduction accessories, level measurement
- Customers: Contractors, end users, OEM
- Territorial regions: Southern Illinois, western Kentucky and eastern Missouri
- Web site: [www.dynamicbulk.com](http://www.dynamicbulk.com)

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***“The principal and rep working closely together achieve a greater gain than could normally be expected. It’s an example of the team working together for the benefit of the whole.”***

the agency’s activities) is that DBS communicates with most of its principals “at least weekly, sometimes daily, and depending on the sales situation, maybe hourly,” says Baker. “We have eight people involved in outside sales, so typically we communicate with our principals on a frequent, though varied, basis. We use each of the tools described: phone, cell phone, fax, e-mail.”

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#### **A View of Manufacturers’ Communication**

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Turning the tables a bit, Baker explains that his principals generally do a very effective job of communicating with the agency. “Mostly they communicate with us the same way we communicate with them. In addition, several have invested in a special area of their web site that is for representatives only. Examples would be Eriez Magnetics, New York Blower, Siemens-Milltronics, and Hapman Conveyors. (Also, Rotex has one under development.) This is a great tool to provide technical, marketing and strategic information to the rep force. In addition, we get leads from these web sites; we can get order (manufacturing/shipment/invoice) status on open orders; and we can get sales analysis information, etc.”

Despite best intentions, not everyone is perfect — and that

includes reps and principals. One way that a relationship can be harmed is by a lack of communication. When asked about that, Baker and Brown agreed that both the rep and the principal have to work overtime to ensure they have effective lines of communication open at all times. Failure to do that can cause one or the other to be blindsided.

In response to the potential for being blindsided, one of the only examples either partner could think of occurred on the very rare occasion when a principal may have visited a customer in the territory without letting the rep know their plans. Both men emphasize that not only do they like to be involved in such manufacturer/customer contacts, it’s also important that they be kept in the loop when it comes to such communication.

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#### **Defining the Rep’s Job**

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Here’s why, according to Brown: “Our job in the field is to be the eyes and ears of the manufacturer. Who better understands the personnel and the makeup of the companies that we call on? We know what they buy, how they buy, and what their experience has been with the equipment that we sell them. We have the ability to add to the mix. If we have the best chance for an order, we know that. If a job is ‘going south,’ we

know it and can advise the manufacturer not to pursue the matter. We’re the ones who provide the strategic information the manufacturer needs to do the job.”

He continues that “when the principal and the rep act as one, each achieves a greater level of credibility with the customer. On the other hand, when the principal comes in on his own, without the rep’s involvement, it can often take an extended period of time to get the relationship between rep and customer back up to speed.”

Baker adds that “what Steve is speaking about is a perfect example of one plus one adding up to three. The principal and rep working closely together achieve a greater gain than could normally be expected. It’s an example of the team working together for the benefit of the whole.”

If Dynamic Bulk believes the manufacturer ought to be communicating about what he does, so too does the rep believe in communicating back to the manufacturer. Baker emphasizes that they make it a point to keep their manufacturers informed relative to what they’re doing. “Part of that is letting them know about all the extras — the value-adds — that we perform. For instance, if we’re providing customers with handouts or mailings promoting a manufacturer’s products, then we’re sure to send one to the manufacturer so they get a clear view of all that we do for them. Much of what we sell has a long sales cycle. By communicating with our manufacturers, we let them know that our efforts eventually bring results.”

Brown adds that this is just another example of the “communication two-way street that must exist between rep and principal.” □

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