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# A Strategic Approach To Enhancing The Relationship



**L**ast month in the pages of *Agency Sales* we described how one of MANA's sister associations — NEMRA — was identifying, attacking and eliminating waste that resides in the processes performed by manufacturers and their representatives.

This month we identify another effort that has been undertaken between a rep and some of his principals. While the goal we'll be reporting is once again to enhance relationships, this time we'll report how one rep's communication efforts with his principals have gone a long way to provide for accountability while identifying tasks that must be performed on major projects.

Bob Gerrard is the first to admit that what he does with some of his manufacturers isn't for everyone. But for those that meet the criteria for participating in his Internet-based strategic sales meetings, the results are well worth the effort.

Gerrard, president of the Mooresville, North Carolina-based Gerrard & Associates, reported on his Internet Strategic Sales meetings at last fall's MANA CAPSIG meeting in Lou-

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isville, Kentucky. That CAPSIG meeting is reported on in greater detail on page 32.

According to Gerrard, regularly scheduled Internet meetings with three of his principals covering some major projects were the logical outgrowth of something he started in the mid '80s. "I began them with one of my principals that was very big in capital equipment sales. The meetings worked for a time, but eventually I discontinued them because I didn't have principals who were truly sophisticated and possessed the desire to excel at what they did.

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### A Pursuit of Excellence

"To make these meetings effective, he maintains, "You've got to have a manufacturer with projects large and complicated enough to warrant this kind of a look. In addition, they've got to possess a corporate culture that dictates the pursuit of excellence. The status quo is not acceptable for them. That's what I have with these manufacturers. They also have the desire to squeeze as much as they can out of the territory. Ultimately they want to be as good as they can be."

The rep now has some of those principals, and he's taken the logical step of re-instituting the meetings.

Here's how the Internet meetings that Gerrard is referring to help his manufacturers and him reach their respective goals. Armed with the type of principals that he's described above, the rep has configured his ACT software to provide the framework for the monthly strategy meetings. The

prearranged phone and Internet meetings are scheduled for the same day each month. Gerard emphasizes that it's important to stay with a set schedule because "If you begin to move it around, you're going to diminish its importance and confuse people." The meetings are conducted for the purposes of:

- Developing and assigning individual sales strategies on specific projects, jobs or accounts,
- Reporting back on the results from the execution of previously assigned strategies, and
- Using that information to develop new strategies in the ongoing sales process.

Basically, the meetings walk agency and manufacturer personnel through all the steps they need to consider and perform as they tackle their large/sophisticated capital equipment jobs. Gerrard explains, "We look at the job under consideration at each stage including:

- Where do we stand currently?
- Is it in the conceptual stage?
- The active bid stage?
- Is the bid a courtesy bid, or is it a job we need for our very survival?
- Is the project on hold?"

Gerrard emphasizes that the answers to all these questions are developed in collaboration with the people in attendance at the meeting.

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### Accountability for Tasks

As the meeting proceeds, tasks are assigned to individuals, and updates on those tasks are considered at each subsequent meeting.

One of his manufacturers remarked, "Gerrard's process is the best I've ever seen." According to



**Bob Gerrard**

Steve Baker, vice president of sales and marketing, Carrier Vibrating Equipment, "I say that based on the fact that the only thing that matters is that it works."

Carrier, headquartered in Louisville, Kentucky, specializes in the manufacture of vibrating conveyors, feeders, screeners, fluid bed dryers, fluid bed coolers, Tornesh dryers, flash dryers, media slurry dryers, and vibrating spiral elevators with features incorporated to screen, separate, dry, cool, blend and perform various other processing functions.

According to Baker, "When we began working with Bob in his territory, it was a territory that was under-performing for us. Since he's taken it over and be-

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gun using this strategic sales tool, this is a top-performing territory. This is one of our top four performing territories for the last four years, and I don’t think that’s all owing to Bob’s charm and good looks — rather it’s the tools he uses. Why does it work? In my opinion, the primary reasons are:

- The process forces us to stick to the basics of what we need to be doing. It assures that we do exactly what we’re supposed to.
- It sets priorities for us. From the start, it allows us to decide whether we really want this job or not. Maybe our time would be better spent doing something else.
- Accountability is promoted. We know what we’re supposed to do, and once we get moving on a project, that makes our job so much easier.
- You can never over-communicate, and this is an excellent tool that lets both sides know exactly what’s going on. This promotes continued communication and strengthens the bond between principal and rep.
- And finally, these meetings promote strategic thinking. Using this method of communication, it’s clear to us how we’re going to get from where we are today to actually getting the order.”

### **Raising the Professional Bar**

When the rep is asked to gauge the success of his strategic sales meetings with the principals he conducts them with, Gerrard hardly takes a breath before he says, “This approach to dealing with principals has been good for me primarily for two reasons.

- First, it solidifies the relationship I have worked hard at establishing.
- Second, it raises the level of my professionalism.”

On the subject of strengthening the relationship, he continues, “This strengthens our ties because we’re not just working together; rather, we’re collaborating in a joint effort. At the same time, we’re striving to become as good as we can be as we continue our efforts together. When you collaborate with your principals, you’re thinking together. You’re letting them know how interested you are in them, and you’re telling them that you’re willing to invest the time and effort to make the relationship work. I highly value my principals and the time I spend with them. This is another way I can let them know how important they are to me. I learn from them every month in these meetings.

“By participating in these on-line meetings, I can gain from and learn from the best minds in the business. I absorb the knowledge and experience of my principals from all over the country and bring that to bear on my projects here in North Carolina. Compare that experience to my competitors who are operating all by themselves in the marketplace. I hope my competition is the rep who constantly complains about having to meet with and provide call reports to his manufacturers. I’ll run over him like a train.”

When it comes to raising the bar of professional performance, Gerrard notes, “This is the ideal opportunity for me to sell myself to my principal every month. If any of my principals that I engage in this practice with decide that they want to go direct, I want to make sure I’m the last one to go. Having these meetings is a step in letting them know just how professional I am.”

He concludes by noting that an additional byproduct of this type of regularly scheduled strategic planning with principals brings other benefits with it. “I’d point to at least four areas where these activities benefit us:

- Maximizes sales effectiveness — By providing us with a record

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of what we're planning to do and what we've actually done, we're better able to analyze the effectiveness of our efforts.

- Strengthens relationships with principals — As we collaborate in a highly visible manner, we're able to create a synergy and a willingness to learn from each other. In addition, we're accountable to each other.

- Eases the entry of new salespeople — Monthly meetings such as these provide regularly scheduled training opportunities for new salespeople. It immediately plugs them into a full range of the manufacturers' experience and provides oversight and immediate performance review." Gerrard adds that this is especially important given the fact his son, David, is on the verge of joining the agency.

- Activities such as these significantly increase the salability of the rep firm at some time in the future." □

Bob Gerrard, through MyRep Coach, a North Carolina-based coaching/consulting firm focused specifically on manufacturers' representatives and their principals, will be offering the Strategic Sales program to both representatives and manufacturers, with applicable training and coaching, including a web-based software package for trial or permanent use. For information contact MyRep Coach at (919) 518-2793 or e-mail [jay@myrepcoach.com](mailto:jay@myrepcoach.com).

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