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# Benefits Of Technology Take Center Stage At AIM/R Conference

If you thought information overload was a challenge, consider innovation overload.

If that wasn't the theme for this year's AIM/R Conference, it very well could have been considering the innovative developments and ideas that were communicated and exchanged during the association's annual conference in Newport Beach, California, earlier this year.

Leading the charge when it came to bringing the association's membership up to speed on developments in the world of technology were Patricia Pomerleau, CEO of CEOExpress Company, and marketing and management consultant Terry Brock.

Pomerleau, the founder of CEOExpress, one of the Internet's most popular web sites for business executives, cautioned that while you can steal anything you like off the Internet, you can't steal relationships. The role of the rep remains to establish and maintain relationships, and those that perform that task will have bigger roles in the future than they do today.

The concept of creating relationships has changed, however, and that's where the creation of information portals on the Internet, such as CEOExpress, are so important today — and their importance shouldn't be lost on the rep.

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## Building an Internet Community

According to Pomerleau, "What I'm emphasizing here is the ability to build a community or a club — simply stated it's a place to come and get information. That's what it's all about." To make her point, she said, "I love the visual of the watering hole. Historically, isn't that the place where people from all over would come to gather their information? So too it is with an Internet community. Once established, you let the community participate in managing the community."

She emphasized that in the Internet-driven technological world in which we all now work, there are a couple of concepts that are very important as the "watering holes" continue to be built:

- **Change** — "It's critical for today's businessperson to stay abreast of change. Remember the reason people come to you is that you're aware of what's going on in the world. Stay ahead of change."

- **Be very responsive** — "We (CEOExpress) work very hard on that and so should you. It doesn't take much to get back to people when they ask a question."

- **Trust** — "Once you've taken care of the first two matters (change and responsiveness), you've built trust with the members of your community. I can't overstate how important trust is. Once that's accomplished, then you can sell into that community."

Before she was done, Pomerleau couldn't let the opportunity pass to speak directly to what made her AIM/R audience different from others. "I realize I'm speak-



**Max Brown, The Carrot Culture, addressed the opening general session on the importance of properly recognizing and motivating members of the agency team.**



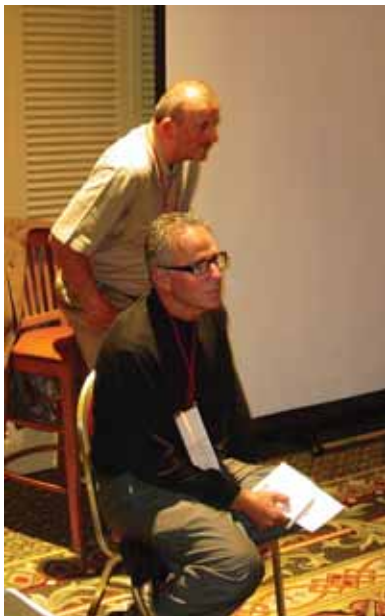
*Top left: Terry Brock, Achievement Systems, Inc., led a general session on “What Successful Reps Need to Know About Technology for Profit.”*



*Top right: Patricia Pomerleau, CEO of CEO Express Company shared her knowledge on the World Wide Web in “Entrepreneurs and Technology.”*

*Below left: Sig Schmalhofer (back) Steve Grosslight field questions from conference attendees during the break-out session, “Conflicting or Complementary: Expectations of the Rep.”*

*Below right: Attendees at the 2007 AIM/R conference in Newport Beach, California, take a break from the presentation to discuss their own views.*



ing to a room full of entrepreneurs. You’re not paralyzed by fear of failure as others might be. Remember that today, smart companies are sharing secrets with rivals, blogging about products in their pipeline, even admitting to their failures. The name of this new game is radical transparency, and it’s sweeping boardrooms across the nation. So strip down and learn how to have it all by baring it all.”

### **Business as Farming**

Terry Brock, the speaker and consultant whose articles regularly appear in the pages of *Agency Sales*, echoed Pomerleau’s emphasis on the importance of relationships when he debunked the claim that “business is war.” According to Brock, “Business isn’t war, it’s about cultivating relationships. It’s more like farming than it is like war.”

Emphasizing that no one builds relationships as well as the manufacturers’ representative, the consultant continued with his farming analogy by saying, “The first thing the rep has to determine is what’s the best thing to plant in a particular soil. Once that’s done, you tend to what you’ve planted by establishing, building and maintaining relationships. Relationships are more important today than they’ve ever been.”

An important part of Brock’s message was that today’s technology is an important ingredient when it comes to developing those critical relationships. “However, the key for reps is that they leverage a competence in technology to help their principals and customers. What you’ve got to do is to develop a quantum competence in specific areas. Until

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you've developed that powerful competence, you're not going to go very far. Acquire the necessary skills to become the 'go-to person' for the people you conduct business with. They have to feel that if they need assistance in a given area, then you are the person to go to. That's the extra value you'll have to provide."

An integral ingredient in being able to develop that competence, according to Brock, is to create quality alliances that will help you to reach your goals. "That's where AIM/R sparkles," he explained. "By working with people like yourselves in this association, you'll be able to assemble a team that will allow you to communicate your value-add."

Some of the technologies that Brock used as examples of tools that can assist reps in their businesses were audio and video tools such as:

- Skype ([www.skype.com](http://www.skype.com)) — a peer-to-peer Internet telephony network competes against existing open VoIP protocols. It is notable for its range of features, including free voice and video conferencing, and its ability to use peer-to-peer technology to overcome common firewall problems.
- TeleNotes Inc. ([www.telenotes.net](http://www.telenotes.net)) — a company that provides a transcription/data entry service for sales professionals and sales management.
- Camtasia ([www.camtasia.com](http://www.camtasia.com)) — Camtasia Studio is the solution for screen recording, editing and sharing high-quality screen video on the Web, CD-ROM and portable media players, including iPod.

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### Technology Provides Dazzle

Brock maintained that the rep should use these and other tools to "dazzle and bring buyers to you.

Couple these technologies with video and you can do away with those face-to-face meetings that fill your schedules."

As to those who might be overwhelmed at the prospect of grappling with such new technologies and who claim, "I'm a people person and not good with technology," Brock recommended a change in thinking. "Realize that if you read the right books and get the proper assistance, you can acquire the knowledge you need to use these technologies. As a result, if someone asks you if you can do something (with a specific technology) your answer shouldn't be, 'No,' it should be, 'Not yet.'

"Remember, you don't have to learn everything there is. Jump on just one little aspect of it and master it. This will enhance the rep's role as the critical link in the marketing channel."

As an example of one entity that has already reached that conclusion, Brock quoted Arthur Sulzberger, publisher of *The New York Times*, who said, "I don't know whether we'll be printing *The Times* in five years, and you know what, I don't care either."

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### Full Slate of Presentations

Pomerleau and Brock weren't the only speakers at the conference, and the importance of technology was hardly the only subject covered during the three-day conference. Among the other highlights of AIM/R's 35th Annual Conference were:

- The importance of properly recognizing and motivating the members of the agency team was emphasized by Max Brown, The Carrot Culture, Salt Lake City, Utah, during the conference's



*During the Town Hall Meeting, moderator Bill Godwin (standing), conference chairman, and panelists (left to right): Mike Parham, vice president of membership; Rick Banner, president, and Bryan Shirley, executive director, answered questions about AIM/R and the industry.*



*Top left: Carolyn Crummey, operations manager, J&K Sales Associates, demonstrated how the Microsoft Outlook software can be used to better organize your day.*

*Top right: Dan Beederman, attorney, covered the perils of everything from e-mails to wrongful conduct, defamation, fraud and harassment.*

*Below: An AIM/R member asks a question.*



opening general session. According to Brown, public speaker and leadership trainer, “Appreciation is one of the lowest-cost priceless things we can do for the people we work with. If paychecks are so important, then why do athletes love the cheers of the crowd? Why handicap our own team by not cheering them on?”

To illustrate why appreciation is so important, Brown used the example of the recently departed CEO of Home Depot. “When Bob Nardelli was hired by that company, he devastated the work force from the very beginning. When he got fired, the employees were cheering in all the stores. Immediately the new CEO changed the environment by writing thank-you’s to the people in all his stores.”

To properly get their arms around the concept of showing appreciation for team members, Brown urged his audience to “make every effort to find out what is important to your employees. Once you do that, make every effort to fill that need. On top of that, provide them with recognition for their efforts.” He continued that recognition should come “frequently, be specific for the tasks performed, and should be timely.”

- To say Microsoft Outlook is more than just software that can be used by reps is an understatement. To illustrate that point, Carolyn Crummey, office manager of J&K Sales Associates, Manchester, New Hampshire, described the breadth and depth of functions that software provides for her agency. Crummey detailed how Outlook functions such as Tasks, Calendar, Journal and Contacts can manage daily activities and customer contacts and

increase efficiency. She described how the software can be customized and designed to work better for individual businesses. To encourage attendees to get familiar with the office tool she urged them to “Go in and play around. You can’t really make a mistake — remember there’s a button called ‘Edit and Undo’ that will correct anything you may do incorrectly. That’s how I figured out everything.”

- A panel discussion entitled “Conflicting or Complementary: Expectations of the Rep” tackled some of the concerns and expectations that reps’ customers have with their performance.

First out of the box with his thoughts on what he expects and needs from the reps who call on him was Steve Grosslight, Ferguson Enterprises, Pomona, California, who said, “Our people are order takers. The biggest thing we need help with from reps is the training of our associates concerning what you have and what you sell. We have to know what the features and benefits are. Without that information we’re lost. I’ll be the first to say that our people are very smart, but they may not know the differences between all the products. Realistically, we’re not properly educating our people. We are going to spend more time, money and energy in that area, but at the same time we’re going to be asking more of you (the reps) to do more product training for us. That’s the biggest want and need that we have.”

### Focus on Training

The focus stayed on the pressing need for training when Tom Baker, president and CEO, Dynamic Plumbing, Riverside, Cali-

***“If you are trying to convince us that a certain product is great and better than anything else available, make sure you can back that up with demonstrable proof.”***

fornia, took center stage. According to Baker, “We are so far behind when it comes to training our plumbers that whatever we can get from you would be great. For instance, if you could convince your manufacturers to provide us with training and video tools showing the applications and installations of your products, that would be very helpful. It would also be a unique value-add for you in the marketplace.”

He continued with the advice, “If you are trying to convince us that a certain product is great and better than anything else available, make sure you can back that up with demonstrable proof. Don’t just say it. Show us.”

“And finally, we want communication from you. Communicate not only with me, but with the plumbing contractor owners and general managers. Show them your line every six months so we’re constantly reminded of the products you represent. Remember that to make an impression on us you must show us you are different. You want us to respond with a ‘Wow’ when you tell us something about you.”

The final member of the panel discussion was Ned Atkins, manager of tubular products for The Keeney Manufacturing Co., Newington, Connecticut. Atkins related that after his years of working with reps, he’s still amazed at all they can accomplish. “I don’t know how many times I’ve accompanied a rep back

to his car for some information. There he has catalog after catalog, displays and all sorts of products. How they can find the important information we need is beyond me, but they’ve always delivered for me.”

### Waving Legal Flags

A number of legal cautionary flags were waved at reps by Attorney Dan Beederman, Schoenberg, Finkel, Newman & Rosenberg, LLC, Chicago, Illinois, during his presentation “Me and My Big Mouth.”

After providing an overview of antitrust laws, the attorney covered the perils of everything from e-mails to wrongful conduct to defamation, fraud and harassment. Specifically on the subject of e-mails, Beederman warned:

- “The informality that is associated with e-mails can be dangerous.
- Avoid jokes or sarcasm because they do not come across well in e-mails and can easily be misunderstood when examined out of context.
- Be careful when responding to e-mails, especially with ‘reply to all.’
- Be careful with ‘forwards.’ Do not forward e-mails containing competitively sensitive information to friends or colleagues who are actual or potential competitors.
- Delete does not mean destroy. The best practice is simply not to put anything in writing that may be later taken out of context or misconstrued.” □