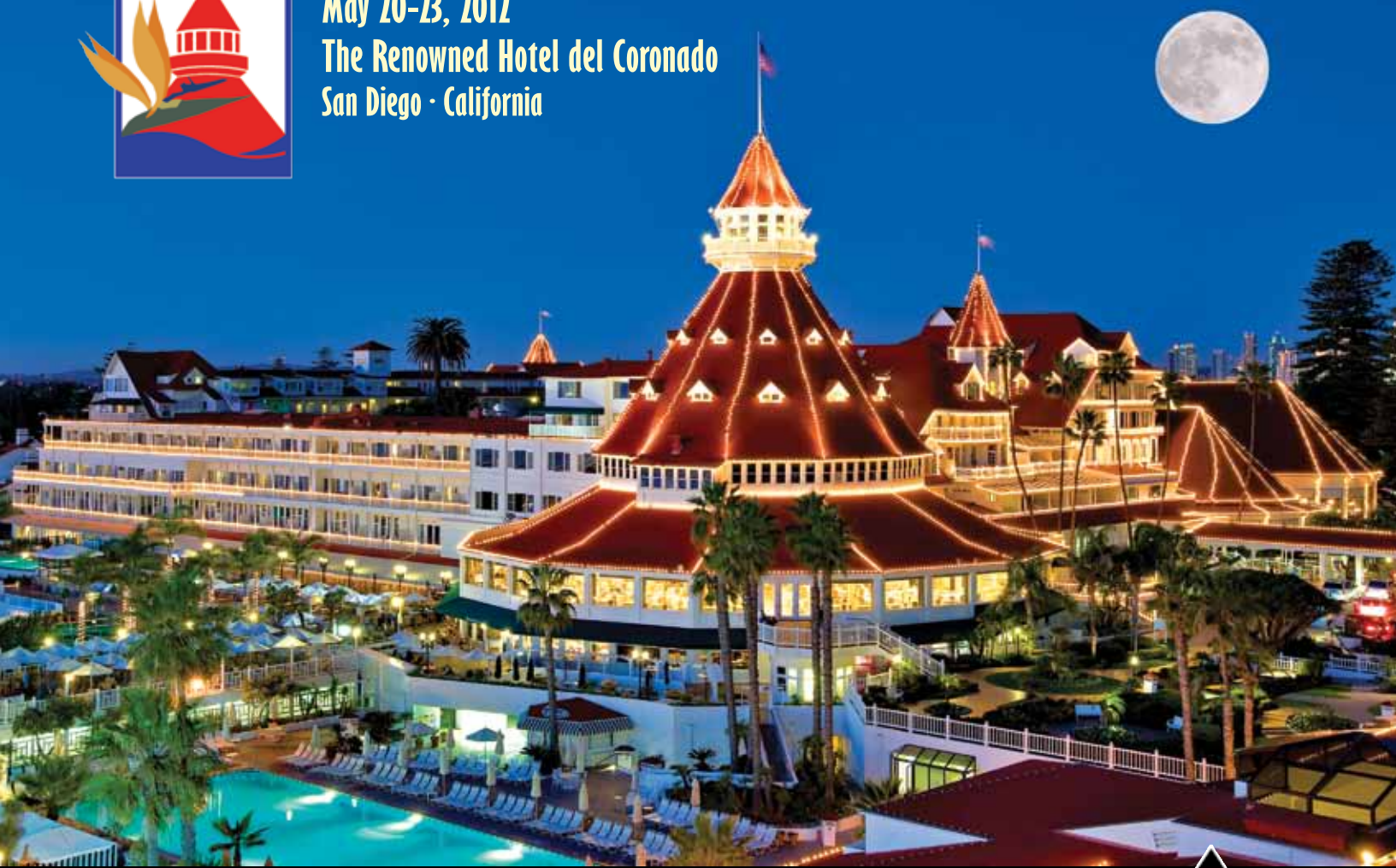


# 40<sup>TH</sup> Annual PTRA Conference

Riding the Tech Wave



May 20-23, 2012  
The Renowned Hotel del Coronado  
San Diego · California



Power-Motion Technology Representatives Association



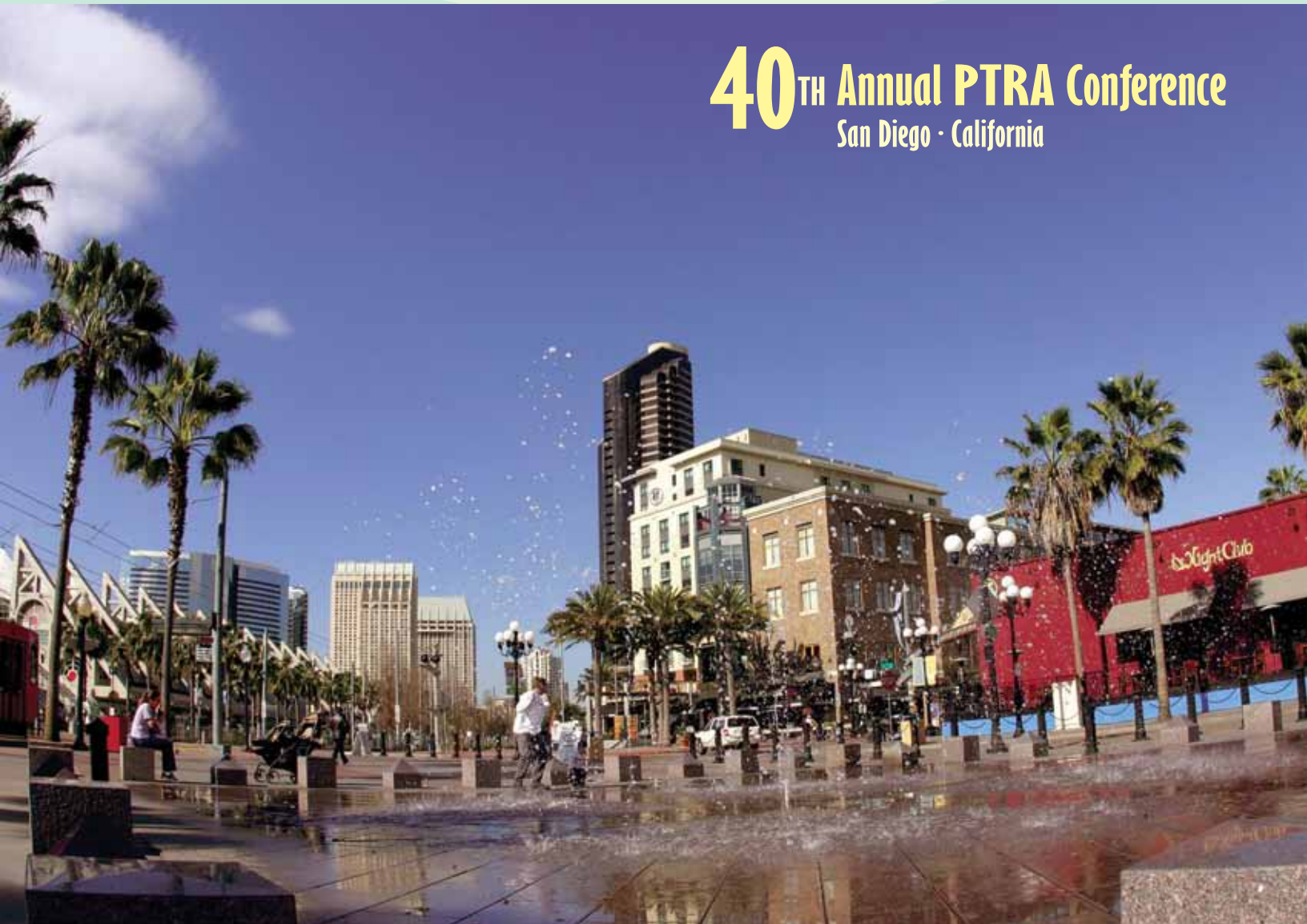
# Conference Highlights

- ◆ **New High-Tech Sales Tools**
- ◆ **Choosing the Right CRM**
- ◆ **Economic Forecast by Alan Beaulieu**
- ◆ **PowerPoint for Successful Sales Presentations**
- ◆ **Communication — Communication vs. Call Reports**
- ◆ **Insights into Applied Industrial Technologies**
- ◆ **Dinner on the Historic Aircraft Carrier Midway**
- ◆ **Staying at the Classic Hotel Del**
- ◆ **San Diego in the Spring**



Photo courtesy of the San Diego Convention and Visitors Bureau

## 40<sup>TH</sup> Annual PTRA Conference San Diego · California



# Conference Schedule

## Sunday, May 20

- 9:30-11:30 am **Spouse Gift Assembly**
- 2:00-5:00 pm **Conference Registration**
- 5:30-6:30 pm **New Members/First-Timers Reception**  
This reception is designed for new members as well as members attending their first conference. The Officers, Board of Directors, and Hostess Committee will be present to welcome you. An overview of the conference and a brief presentation on PTRA will prepare you for one of PTRA's best conferences ever!
- 6:30-8:30 pm **Welcome Reception**  
The kick-off event for the conference gives you an opportunity to catch up with old friends and meet new ones. Heavy hors d'oeuvres, cocktails, and lively conversation will set the tone for the rest of the conference.

## Monday, May 21

- 7:00-8:00 am **Continental Breakfast**
- 7:00-8:00 am **Committee/Task Force Meetings**  
All committee members are asked to attend their respective meetings. Anyone interested in joining and participating in a committee is invited to attend.
- 8:00-8:30 am **Welcome, Opening Remarks and Announcements**
- 8:30-9:45 am **How to Work with Applied Industrial Technologies**  
Bob Curley, Applied Industrial
- 9:00-10:00 am **Charity Walk — Wounded Warrior Project**  
This is the fifth year for this rewarding event. Please support this wonderful cause with your donations and participation. See page to far right for more information on the Wounded Warrior Project.
- 9:45-10:15 am **Break**
- 10:15-11:30 am **Choosing the Correct Tablet Device for Your Business**
- 11:00-12 noon **Spouse/Guest Welcome Brunch**
- 11:45 am-6:00 pm **Annual Golf Tournament**
- 6:00-7:00 pm **Cocktail Reception (No Host)**
- 7:00 pm **Dine-Arounds**  
Small group reservations have been made at a number of local restaurants. Sign up and go to dinner with fellow PTRA members and guests. Visit with old friends and make some new ones.

## Tuesday, May 22

- 7:00-8:00 am **Continental Breakfast**
- 7:00-8:00 am **Past-Presidents Breakfast**
- 8:00-8:30 am **Annual Business Meetings**  
Principal and Representative business meetings will be held concurrently
- 8:30-9:30 am **Breakouts — Session 1**
  - **How Tablet Computing Functions in a Business Environment**
  - **Creating Presentations in Microsoft PowerPoint that Close the Sale**
  - **Choosing the Right CRM for Your Business**
- 9:30-9:45 am **Break**
- 9:45-10:45 am **Breakouts Repeat — Session 2**
- 10:00 am-4:00 pm **Spouse Activity — Balboa Park and the Zoo**
- 10:45-11:00 am **Break**
- 11:00 am-12 noon **Breakouts Repeat — Session 3**
- 12:00-1:00 pm **Lunch on your own**
- 1:30-5:30 pm **RepMIX**  
This entire afternoon is dedicated to providing opportunities for concentrated face-to face communications.  
**Principals can:**
  - Meet with prospective representatives for open territories
  - Meet with your reps who are in attendance
  - Meet with other principals to discuss mutual issues**Representatives can:**
  - Interview with principals who are looking for reps
  - Meet with your principals who are in attendance
  - Meet with other reps to discuss mutual issues
- 1:30-5:30 pm **Legal Consultations — Meet privately with PTRA's Legal Counsel, Mitchell Kramer, for a no-charge 30-minute session, appointment required.**
- 6:30-7:30 pm **Cocktail Reception (No Host)**
- 7:30-10:00 pm **Dine Around**

## Wednesday, May 23

- 7:00-8:00 am **Continental Breakfast**
- 7:00-8:00 am **Committee/Task Force Meetings**  
2011-2012 committees will meet. Anyone interested in joining and participating in a committee is invited to attend, whether or not you attended an initial committee meeting on Monday.
- 8:00-8:15 am **Daily Announcements, Reminders and Updates**
- 8:15-8:45 am **Induction of New Officers**
- 8:45-9:45 am **Drawing the Line Between Communication and Call Reports — Joe Miller, Miller Management Services**
- 9:45-10:15 am **Break**
- 10:15 am-12 noon **Make Your Move**  
Alan Beaulieu, Institute for Trend Research  
Alan Beaulieu will be taking a look at what is happening in many key industries and he will be addressing some of the questions common to all attendees.
- 12 noon **Lunch on your own**
- 6:30-10:00 pm **Networking Reception and Dinner on the USS Midway**  
This is not to be missed! We will have access to both the Flight Deck and Hangar Deck and there will be docents available to answer questions. Plan your departure for Thursday so as not to miss this great opportunity for a unique closing event and to honor our military. Transportation provided.





## Breakout Sessions

### 1 How Tablet Computing Functions in a Business Environment

This breakout session will really be two sessions based on tablet operating systems, Android and Apple. Choose the one that interests you.

Subjects covered:

- Business applications for tablets
- Using tablets with your computer system
- Tablet uses in customer calls

### 2 Creating Presentations in Microsoft PowerPoint that Close the Sale

Steve Turner, Turner Time Management

Does it take you too long to create an effective sales presentation using PowerPoint? Do you wrestle with using the key features of PowerPoint to create and deliver the best presentation possible? Do you want to know how to modify an existing PowerPoint sales presentation for another customer quickly and easily? Without any instruction, most of us struggle with creating an effective sales presentation in PowerPoint, which is why there is TurnerTime! In this hands-on workshop, Steve will demonstrate how you can create an effective sales presentation in PowerPoint quickly and professionally. Topics covered include:

- The 10 key elements to include in any PowerPoint sales presentation
- The Secrets to a successful sales presentation that are often forgotten when using PowerPoint
- WOW! PowerPoint functions/commands that can make your presentation more powerful
- Creating a professional looking sales presentation template quickly and easily
- Using master slides to save creation time and make your presentation consistent
- Working quickly and efficiently with images and shapes
- Copying/changing text and fonts in seconds and much more

### 3 Choosing the Right CRM for Your Business

David Innis, San Diego CRM Consulting

This breakout will answer your questions about CRM and help you to choose the right one for your business.

- Cloud-based systems will be described
- Discussion of Sales Force
- Discussion of Act
- Discussion of Goldmine
- Comparison of the advantages and disadvantages of CRM programs.

### Hotel del Coronado

The Hotel del Coronado has been named the No. 1 Hotel in the U.S. by *Celebrated Living*, the luxury magazine for American Airlines premium class. Excellence in hotel hospitality requires three key elements. First, a very clear idea of what amenities guests value most. Second, is service that is intuitive, proactive, anticipatory, subtle and intensely personal. And finally, a hotel needs a great location. All those qualities are found at the historic Hotel Del, establishing that newer isn't necessarily better. After all, the resort opened in 1888.

As a National Historic Landmark, the Hotel del Coronado has a rich and colorful heritage that sets it apart from neighboring Coronado hotels. From Marilyn Monroe to Charles Lindbergh, from state dinners to the ghost of Kate Morgan, The Del is an American treasure with more than 120 years of fascinating stories to tell. Today, we invite you to create new memories at this cherished hotel in Coronado.

**Babcock & Story** — The Del's visionary founders, Elisha Babcock and H.L. Story, dreamed of building a seaside resort that would be "the talk of the Western world." Since then, the resort has become a living legend, visited by celebrities, dignitaries and U.S. Presidents. In fact, publisher Rand McNally recognized the Hotel del Coronado for enjoying "more fame and historical significance than perhaps any hotel in North America."

**American Legends** — The Del has played host to some of America's greats, including Thomas Edison, L. Frank Baum and Babe Ruth. Famed aviator Charles Lindbergh was honored at The Del in 1927 after his successful trans-Atlantic flight. At this lavish banquet, a replica of Lindbergh's "Spirit of St. Louis" circled the enormous Crown Room ceiling.

**Presidents & Princes** — Eleven U.S. Presidents have visited The Del, starting with Benjamin Harrison in 1891. One of the resort's most famous visitors was England's Prince of Wales in 1920. He would later become King Edward VIII, only to give up his throne in 1936 to marry Coronado divorcee Wallis Spencer Simpson. Many have speculated that they may have first met at The Del.

**Hollywood Connection** — Hollywood has been making movies at The Del since 1901. In 1958, The Del was the backdrop for the comedy classic *Some Like It Hot*, starring Marilyn Monroe, Tony Curtis and Jack Lemmon. The resort has also seen a steady stream of celebrity visitors - from Charlie Chaplin and Humphrey Bogart to Brad Pitt and Madonna.

**The Ghost of Kate Morgan** — What Victorian resort would be complete without a resident ghost? Kate Morgan checked into the resort on November 24, 1892, and never checked out. Reports of ghostly happenings, all thought to be connected to the death of this beautiful young woman, have been circulating at The Del ever since.

### Hotel Rates & Amenities

**Rooms:** Relax in a harmonic blend of historic luxury and modern convenience — all mere footsteps from the Pacific Ocean. Hotel del Coronado room options are based on size (ranging from small to extra-large) and views (ranging from limited view to full oceanfront view). The unique variety of hotel room options at this award-winning San Diego area luxury destination make The Del the ideal choice for families who like to stay and play together, as well as for couples who long for an idyllic retreat.

**Victorian Rooms:** These historic San Diego hotel rooms, located in the Victorian Building, are between 200- and 289-square feet and have one queen bed, without an ocean view. Decorated in rich colors, they embody the hotel's unique heritage and are distinct in size and shape.

**Resort Rooms:** These medium-sized rooms, between 290- and 350-square feet, are located primarily in the Ocean Towers and California Cabana buildings, with a few rooms in the Victorian Building. From the tropical feel of the Towers and Cabanas to the casual elegance of the Victorian Building, the Resort Rooms blend functionality with fun. Great for family vacations, they are also the perfect choice for special occasions and romantic getaways.

There is a resort fee of \$10 that includes the following amenities:

- Daily newspaper delivery (Monday-Saturday)
- In-room coffee and tea
- Fitness center access
- Fitness classes
- Local, "800" and credit card calls
- Hi-speed internet access

- \$20 discount off greens fees at La Costa Golf Course
- Discounts on tickets to Sea World, Legoland, Wild Animal Park, Old Town Trolley and Disneyland

**Rates:** We have been able to obtain a fantastic rate at the Hotel Del. Run of the House guestrooms are \$215 plus taxes and \$10 resort fee. Room rates are also good three days prior and three days post conference dates based on availability. Upgrades to Partial Ocean View and Ocean Front rooms at \$279 and \$389 respectively can be made based on availability at the time of your reservation.

**Cut-off date for hotel reservations is April 27, 2012.** After this date there is no guarantee that you will be able to obtain a room at these rates or at this hotel. A one night's room deposit must be made at the time of reservation. Cancellations must be made seven days prior to arrival date to receive a refund on your deposit. Please call 800-468-3533 to make your reservations and be sure to mention that you are with PTRA to ensure you receive the correct room rate. There is also a link on the PTRA web site, PTRA.org, to make direct room reservations.

### Getting There

San Diego International Airport services this area. Most major airlines go in and out of San Diego.

For those with more time for travel, Amtrak has its terminal not far from the airport.

### Ground Transportation

All airports provide rental cars. Parking at the hotel is approximately \$37 per day for valet parking and \$25 per day for self-parking.

Cloud 9 Super Shuttle can provide ground transportation to and from the airport or Amtrak station and the Hotel Del at a discounted price of \$14 per person one way. There is a link on the PTRA web site, PTRA.org, to make reservations or you can call 1.800.258.3826. Please make sure to mention you are with PTRA or give them the group code (U795F).

### What to Wear

Casual and comfortable clothing is the rule at PTRA conferences. No ties and jackets are required for the sessions. You are encouraged to wear casual clothing to the seminars.

Weather in California at this time will normally be about 75° during the day but can get cool in the evening, so please remember to bring a jacket or sweater.

### Spouse/Companion Programs

The spouse/companion registration fee includes the Spouse/Guest Brunch, Welcome Reception, and the Closing Dinner. If this is your first time attending the conference, you are also invited to attend the First-Timers Reception.

We will also be arranging transportation to Balboa Park in San Diego. Balboa Park is made up of more than 1,000 acres and offers 15 museums, various gardens, arts and international culture associations, as well as the San Diego Zoo, making it a place that offers something historical, horticultural, educational and recreational for everyone. There will be a link on the PTRA web site as to what the park offers and available discounts for all the park has to offer. There is also a free park tram to get you round to the different areas when your feet just won't go! There will be an additional cost associated with this outing. Further information will be provided as details are completed.

### Golf Tournament

Although Coronado Golf Course is a very well-maintained golf course with beautiful San Diego harbor and downtown views — the local reputation is that it's more difficult to get a tee time reservation at Coronado Municipal Golf Course than at Torrey Pines Golf Course!

Opened in 1957, Coronado Municipal Golf Course reigns as one of the finest public golf courses in the nation and is located just minutes from the Hotel Del. The course measures 6,590 yards from the blue tees and is a par 72. Immaculate greens, wide inviting fairways and dramatic views coupled with incomparable weather make Coronado a must play for all golfers year round.

### Reviews from GolfLink.com:

- "Nicely maintained municipal course in beautiful Coronado, CA. With palm trees, bay views, San Diego-Coronado Bridge views, a good layout, a practice range, friendly staff — all at popular prices ... What's not to like?!"
- "The course plays and feels like a Florida sandbelt course ... ok but a little uninspiring with several back and forth holes. What really makes it worth a visit is the setting. Several holes are on the Bay and one stretch has views across the marina to the Hotel del Coronado. Virtually every hole has a view of something: water, the bridge, downtown or the shipyards. For a golf course in the heart of one of San Diego's premier neighborhoods, at \$25 walking it's an unbeatable value. Late afternoon play can be on the cool side, so take a jacket even if it's sunny when you start."

Coronado Municipal Golf Course is a quick 10-minute walk from the hotel. **Bill Taylor will be the golf chairman this year.** If you have questions regarding how the tournament will be managed, you may contact him at btaylor@tiscotampa.com. Do not contact him to register for the tournament. Use the registration form provided or call PTRA headquarters @ 888-817-7872.

### Charity Walk

**This year we are running/walking for the Wounded Warrior Project.**

Wounded Warrior Project™ (WWP) exists to honor and empower wounded men and women who incurred service-connected injuries on or after September 11, 2001. Wounded Warrior Project (WWP) began when several veterans and friends, moved by stories of the first wounded service members returning home from Afghanistan and Iraq, took action to help others in need. What started as a program to provide comfort items to wounded service members has grown into a complete rehabilitative effort to assist as they recover and transition back to civilian life.

Tens of thousands of service personnel and caregivers receive support each year through WWP programs designed to nurture the mind and body, and encourage economic empowerment and engagement. Their vision is to foster the most successful, well-adjusted generation of wounded service members in our nation's history. To learn more about this charity — go to: [www.woundedwarriorproject.org](http://www.woundedwarriorproject.org).

Let's honor these true heroes by signing up to run/walk for this great cause. If you can't run or walk, you can donate. Minimum donation is \$35 to receive a commemorative t-shirt, but all donations will be accepted. All proceeds after expenses will go to the WWP. Please mark your donation on the registration form.

### Dine-Around

Don't forget to sign up for this yearly event. This is how it works. We provide a time and place that you can join others of our group to have dinner in an environment of fun and camaraderie. Groups will be small, 8 to 10 people, so that everyone in the group gets an opportunity to introduce themselves and get to know the others. Everyone will be responsible for their own food and beverage tab. Sign ups will occur at the conference at the registration desk. A list of restaurants will be provided at the conference along with sample menus. We will then place you in groups and send you off to dinner. All restaurants will be within walking distance of the hotel.

This is a great way for first-time attendees to get to know your peers at the conference and learn more about PTRA. **Don't miss out on this event!**

### Conference Banquet

This year we are having our banquet on the USS Midway! Prepare yourself for a lifetime memory aboard the USS Midway Museum. You'll explore a floating city at sea and relive nearly 50 years of world history aboard the longest-serving Navy aircraft carrier of the 20th century.

You will be transported by motor coach to the Midway. After boarding the ship, you will have some time to explore the many displays and ask questions of knowledgeable docents while having cocktails on the Flight Deck. Dinner will be on the Hangar Deck after which you may continue to explore until time to leave. The gift shop will be open so you can get that last minute memento to take home. The banquet is included in your registration fee, but reservations are required. See registration form.

# Conference Speakers



## Alan Beaulieu | Institute for Trend Research

One of the country's most informed economists, Alan Beaulieu is a principal of the Institute for Trend Research where he serves as President. He is co-author of *Make Your Move*, a book on how to increase profits through business cycle changes, and is host of *Make Your Move*, a business radio talk show heard on Monday afternoons on The Voice of America™ and World Talk Radio™ Networks. Beaulieu has been consulting and advising companies throughout the U.S., Europe, and Japan on how to plan for and prosper through business cycles. Pronouncements from Beaulieu and the Institute for Trend Research have appeared in or on the *Wall Street Journal*, *New York Times*, *Barron's*, *USA Today*, *Knight Ridder News Services*, *Business Week*, Associated Press, Reuters, CBS Radio, *The Washington Times*, CNN Radio, Sirius talk radio, KABC, NPR affiliate WLRN and numerous other outlets. Beaulieu has been providing workshops and economic analysis seminars across the U.S. to literally thousands of business owners and executives for the last 20 years.

## Robert Curley | Applied Industrial Technologies

Robert (Bob) Curley attended Wright State University, Dayton Ohio. He started with Bearings, Inc. in 1979 (name changed to Applied Industrial Technologies in the late 90s). Bob has held a variety of positions including Inside Sales, Outside Sales, General Manager, Regional Manager. His current position is Area Vice President, Southeast, covering The Carolinas, Tennessee, Alabama, Georgia, Florida, Mississippi, Louisiana and a portion of Kentucky.



## David Inniss | San Diego CRM

David Inniss is the President of San Diego CRM and a seasoned business and IT consultant with over 20 years full-time consulting and sales experience in many different markets. He received his BA (Mathematics) from Penn State in 1985 and his MBA (Healthcare Administration/ Finance) from San Diego State in 2002. He is the past Chief Technical Officer for Children's Hospital San Diego, California, as well as Baylor Healthcare in Dallas, TX and has carried a Sales quota, been a Sales Manager, Vice President of Sales & Marketing as well as CEO/COO/ CTO/CIO for many companies. David has successfully completed CRM projects for over 700 companies.



## Joseph W. Miller | Miller Management Services

Joe Miller, MANA's former President/CEO, was President of JWM & Associates, Inc., his own agency, for 12 years. His agency represented companies that manufactured process equipment, code pressure vessels, piping systems and components. His products were sold at the senior management level of Fortune 500 companies. Prior to that, Joe was Vice-President and General Manager of Johnson Controls' Engineered Products Division for four years and General Manager of Gulf+Western Energy Products Group Kansas and Texas operations. He earned a B.B.A. in Economics from Georgia State University and attended graduate school at California State University. He completed the American Management Association's Senior Management course in 1984 and was a member of the Board of Directors of the Small Business Legislative Council. Joe has over 40 years of industry experience covering both sides of the fence — manufacturing and sales agency management. His articles have appeared in *Agency Sales* magazine and numerous other industry publications. He has lectured about the benefits of outsourcing sales at leading manufacturer's associations, rep industry conferences, Ohio State University, Pepperdine University's Graduate School of Business, The World Congress of Commercial Representatives in Vienna and a variety of other foreign and domestic venues. After serving eight years as CEO of MANA, Joe has retired to a life of consulting with manufacturers on the use of independent sales companies and serving as an expert witness in litigations involving reps and principals.



## Steve Turner | Turner Time Management

Steve Turner is the former Executive Vice President of Sales & Marketing for Clover Technologies Group, the industry leader in compatible imaging supplies and innovative environmental solutions. An integral part to taking Clover from \$43 to \$265 million in just over four years, Turner and his groundbreaking strategies for time management and productivity helped rocket Clover to the industry's number one position. His proven ability to leverage technology (including desktops, laptops, and mobile devices) is of great value to anyone in need of greater sales and productivity results.

## Registration Fees

Early Bird Discounts are available until March 15, 2012.

After this date, full registration fees will apply.

**Cancellation policy:** Cancellations received before April 1, 2012 will receive a full refund. Cancellations received between April 2-30, 2012 receive a 50% refund. No refunds will be issued after April 30, 2012.

Cancellations must be in writing and faxed to 949-855-2973 or e-mailed to linda.mckee@ptra.org.

## Online registration at PTRA.org



	EARLY-BIRD FEE	REGULAR FEE
First registration from firm	\$599	\$675
Second registration from firm	\$550	\$625
Retired Member	\$500	\$575
Spouse/Guest & Children 18 and over	\$375	\$425
Children (under 18)	\$100	\$120
Non-PTRA Member	\$650	\$725
Vendor	\$700	\$700
Principal Member RepMIX Booth	\$250	\$275
Golf Only	\$150	\$150
Golf + Sponsorship	\$325	\$325
Golf Sponsorship Only	\$200	\$200