

# MEMBERSHIP MARKETING PACKET



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Thank you for considering the PTRA! Did you know the PTRA has been bringing Manufacturers Representatives and businesses together for more than 45 years? We present a significant value to any manufacturer who needs high caliber sales people. Here are a few metrics we'd like to offer:

## ***DID YOU KNOW?***

**Total Annual Business by PTRA Rep Channel**

**~ \$1.6 Billion**

**Active Sales Representatives**

**490+**

**Average Years of Experience Per Salesperson**

**23**

**Average Commission Rate Paid to the Agency**

*(This is your cost of sales)*

**6.44%**

**Sales People that have Professional Designations**

*(CSP - Certified Sales Professional and/ or CPMR- Certified Professional Manufacturers' Rep)*

**41%**

**Members that have Warehouses**

**52+**

The value of Manufacturers Reps, who are members of the PTRA to manufacturing businesses, is immense. They positively affect profitability by reducing the costs involved in the sale and by giving more quality opportunities developed through long term relationships. Also, PTRA members are known for their high degree of integrity and ascribe to a Code of Ethics.

PTRA members are easy to access. Go online at [www.ptra.org](http://www.ptra.org) to join the PTRA or find contact information about any member. Come to the 46th Annual Conference to meet with your sales team, network with other Principal members or to seek new successful sales people. There are also great opportunities to learn more about our industry by listening to a number of excellent speakers.

Thanks again for considering the PTRA and its members for your business.

# MEMBERSHIP BENEFITS

## **Annual Conference:**

A forum in which you can discuss common operational problems, participate in exchanges with other manufacturers and representatives, and schedule interviews with representatives for open territories.

## **Online Locator:**

A searchable database of all PTRA members where Principal Members can search for representatives by territory by using an interactive clickable map feature. Representative Members can also search for manufacturers to represent.

## **Lines Available:**

A section of the PTRA Website where Principal Members can advertise for representatives to meet immediate open-territory needs.

## **Consultation:**

PTRA's Legal Counsel is available for brief consultation at no charge either by telephone or by private interview during the Annual Conference. More extensive work for members is contracted at reduced rates.

Through our mentoring program, former reps with many years of experience on both sides of the principal/representative relationship are available for counseling throughout every business day.

## **Education:**

Educational seminars designed to enhance the performance of your professional representative field sales force, conducted by the Manufacturers' Representatives Educational Research Foundation (MRERF), and the Manufacturers' Agents National Association (MANA).

This is inclusive of, but not limited to, the designations of "Certified Professional Manufacturers' Representative" (CMPR) and "Certified Professional Sales Consultant" (CPSC). Members of PTRA also receive a 15% discount off the standard tuition rate for courses at IDC University.

In addition, we are thrilled to present PTRA Academy! PTRA has partnered with THORS, an online web-based learning system that gives you access to extensive, comprehensive subjects across manufacturing. This is a great opportunity to improve skills, bottom line, and career prospects. PTRA is highlighting one class per month at a reduced rate for PTRA members, along with all other classes. Members will have access to those classes for double the amount of time as non-members.

Throughout the year of 2020 and COVID-19, PTRA has also conducted several best practice and business help webinars that are made entirely free to members. These include anywhere from Microsoft Teams tutorials to navigating life in the COVID-19 era.

## **Contracts:**

A Model Sales Representation Agreement prepared by PTRA's legal counsel.

## **Newsletters:**

Monthly member communications are sent out that contain information about Association activities, business information, legal and financial advice, member news and commentary on topics of broad interest.

## **Special Reports:**

Special Reports, research bulletins, and position papers dealing with specific issues relevant to rep/principal interdependence.

## **Professionalism:**

Membership applications are reviewed by the Membership Committee and approved by the Board of Directors; our membership comprises top industry professionals, each upholding our Code of Ethics.

## **Interdependence:**

A continuing commitment to develop effective relationships between reps and manufacturers that result in increased profits for suppliers and increased income for representatives.

# MANA MEMBER BENEFITS

## Representative:

- 12 Steps to Rep Professionalism Manufacturers' Agent Professionalism Program
- Free "Member in Good Standing" Web Page
- Business Telephone Counseling
- Legal Telephone Counseling
- Agency Sales Magazine (online only)
- Special Access to European Manufacturers Seeking Reps
- MANA iToolbox e-Newsletter
- Special Reports and Publications
- Webinars and Teleforums
- Agreement Guidelines
- Seminars to Educate Your Principals
- Commission Protection Acts
- Sales Lead Generation Program

## Manufacturer:

- Steps to Becoming a High-Quality Principal Program
- Business Telephone Counseling
- Legal Telephone Counseling
- Agency Sales Magazine
- Special Reports and Publications
- Manufacturer's Seminars
- Webinars and Teleforums
- Agreement Guidelines

After 25 years of direct selling and executive sales management for two of the premier power transmission and bearing manufacturers, I joined a company utilizing Manufacturer's Representatives as the field sales force. PTRA provided resources and relationships that facilitated an easy transition from a direct sales force to selling through Reps. Through the process I have found that if managed properly, selling through Reps has many distinct advantages and being a member of a dedicated organization like the PTRA has helped our company maximize the efficiency of our critical frontline sales team.

The annual PTRA convention provides manufacturing members with an excellent venue for interacting with all of their Rep partners in a great environment for learning how best to achieve success in the selling effort. The Rep Mix allows members to meet and discuss critical issues as well as a great opportunity to fill open territories when needed. During my five years as a PTRA member, the convention agenda has continually opened my eyes to the motivations that drive productive Manufacturer/Rep relationships.

Overall, **the excellent training opportunities, legal assistance, and relationship building makes the PTRA an organization that is a must** for any company that utilizes Manufacturers Representatives. PTRA has been extremely beneficial in my transition and in the acceleration of KWS sales growth. KWS will continue to expand our support and participation in the PTRA for many years to come.

**Jim Collins**

**Executive Vice President**

**Sales & Marketing**

**KWS Manufacturing Company, Ltd.**

# MISSION STATEMENT

The **POWER-MOTION TECHNOLOGY REPRESENTATIVES ASSOCIATION (PTRA)** is an Association of independent manufacturers' representatives and manufacturers dedicated to promoting the sales representation (rep) function in the power transmission and motion control industries. PTRA will strive to offer all members opportunities for education, information exchange, networking with other reps and manufacturers, plus an array of quality services designed to improve career performance and professional stature.

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# CODE OF ETHICS

The position of the representative is unique in that he is the liaison between the distributor, the original equipment manufacturer, the consumer, and the company he represents.

As a power transmission/motion control advisor he owes a high professional duty towards the distributor, the original equipment manufacturer and at the same time he occupies a position of trust and loyalty to the company he represents.

Only by observing the highest ethical balance can he avoid any conflict between these obligations.

## **THEREFORE, I BELIEVE IT TO BE MY RESPONSIBILITY:**

- To hold my business in high esteem and strive to maintain its prestige.
- To keep the needs of my distributors always uppermost.
- To respect my distributors' confidence and hold in trust personal information.
- To render continuous service to my distributors, customers, and their employees.
- To employ every proper and legitimate means to persuade my customers to use the proper equipment for the application if known; but to rigidly adhere to the highest standards of business and professional conduct concerning these recommendations.
- To present accurately, honestly, and completely every fact essential to my distributors' and customers' final decisions.
- To perfect my skills and add to my knowledge through continuous thought and study.
- To study my business on such a high plane that others emulating my example may help raise the standards of our vocation.
- To keep myself informed with respect to my manufacturers' policies, rules and regulations, and to observe them in both letter and spirit.
- To respect the prerogatives and cooperate with all others whose services are constructively related to ours in the meeting of the needs of our distributors and customers.

# 2021 – 2022 PTRA

## BOARD OF DIRECTORS LISTING

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### **President**

#### **Peter Liston**

Summit Agencies, Ltd.  
Edmonton, AB  
peter@summitagencies.ca  
(708) 406-7462

### **First Vice President**

#### **Don Sutfin**

Pro-Power Associates, Inc.  
Rochester, NY  
don@propowerreps.com  
(716) 870-3301

### **Second Vice President**

#### **Andy Simpson**

SKA Simpson & Associates, Inc.  
Acworth, GA  
andy@skadrives.com  
(205) 246-9296

### **Treasurer**

#### **Mike Mattis**

Industrial Component Sales, Inc.  
Hudson, WI  
mmattis@icsreps.com  
(612) 991-0263

### **Secretary**

#### **Royce Herring**

W.C. Brooks Company, Inc  
Austell, GA  
rherring@wcbrooksco.com  
(770) 933-0453

### **Immediate Past President**

#### **Adam Cooler**

J.W. Cooler Company  
Austell, GA  
adamcooler@jwcooler.com  
(770) 944-2440

### **Principal Director, Chairman**

#### **Anita Kozlowski**

Screw Conveyor Corporation  
Hammond, IN  
akozlowski@screwconveyor.com  
(219) 931-1450

### **Principal Director**

#### **George Dib**

Solve Industrial Motion Group  
Charlotte, NC  
gdib@solveindustrial.com  
(803) 526-5583

### **Principal Director**

#### **Mathew Neff**

Stober Drives  
Maysville, KY  
mathew.neff@stober.com  
(606) 759-5090

### **Representative Director**

#### **John Mackenroth**

Industrial Component Sales, Inc.  
Bemidji, MN  
jmack@icsreps.com  
(218) 444-5712

### **Representative Director**

#### **RJ Evans**

Midwest Conveying Solutions  
Pemberville, OH  
rj.evans@midwestconveying.com  
(419) 691-7616

### **Representative Director**

#### **Oscar Castillo**

Conveying & Power  
Transmission Solutions  
Itaska, TX  
ocastillo@c-pts.com  
(817) 781-3040

### **Representative Director**

#### **Dan Bendell**

Divine Industrial Sales, Inc.  
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danbendell@divineindustrialsales.com  
(612) 220-8886

### **Representative Director**

#### **David Murphy**

Nobis Industrial Sales  
Powell, OH  
david@nobisindustrial.com  
(614) 203-1573

### **Representative Director**

#### **Billy Taylor**

Taylor Industrial Sales Co.  
Atlanta, GA  
bill3@gotisco.com  
(813) 240-4580

### **Past Presidents**

### **Advisory Council**

#### **Curt Benson**

Benson Engineering Co.  
Rockwall, TX  
curt.benson@bensonengineering.com  
(214) 324-0438

### **Legal Counsel**

#### **Barbara Kramer**

Kramer & Kramer, LLP  
Ann Arbor, MI  
bkramer@kramerandkramer.com  
(734) 821-1055



# PRINCIPAL MEMBERSHIP APPLICATION

## Qualifications for Principal Membership in PTR A:

- All applicants must meet the qualifications of the Association's Bylaws. See **www.ptra.org** or call PTR A headquarters for a copy.
- The applicant must be principally a manufacturer, importer, or assembler of power transmission or motion control products, which markets in at least a portion of North America through manufacturers' representatives.
- The applicant must maintain a registered office in North America.
- The applicant must be sponsored by at least one member firm.



## Send completed application along with dues payment to:

**PTR A**  
**5353 Wayzata Blvd. Suite 350**  
**Minneapolis, MN 55416**

**Phone: (888) 817-7872 or (952) 564-3051**  
**Fax: (952) 252-8096**  
**E-mail: ptrahq@ptra.org**  
**Website: www.ptra.org**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ ZIP+4/Postal Code: \_\_\_\_\_

Country: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Web Site: \_\_\_\_\_

Year Company was Founded: \_\_\_\_\_

☐ Sole Proprietorship      ☐ Partnership      ☐ LLC      ☐ Corporation

Name and Title of Firm's Primary Representative to the Association: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Spouse's name for the Directory: \_\_\_\_\_

Spouse's home address for special interest mailings: \_\_\_\_\_

\_\_\_\_\_

# PRINCIPAL MEMBERSHIP APPLICATION

## Products Manufactured:

- |  |  |
|--|--|
| <input type="checkbox"/> Actuators               | <input type="checkbox"/> Gear Drives                           |
| <input type="checkbox"/> Adjustable Speed Drives | <input type="checkbox"/> Gear Manufacturing Services           |
| <input type="checkbox"/> Air Handling            | <input type="checkbox"/> Gears                                 |
| <input type="checkbox"/> Bearings                | <input type="checkbox"/> Industrial Hardware and Machine Parts |
| <input type="checkbox"/> Belting & Belt Drives   | <input type="checkbox"/> Linear Motion Devices                 |
| <input type="checkbox"/> Brakes                  | <input type="checkbox"/> Lubrication                           |
| <input type="checkbox"/> Bulk Material Handling  | <input type="checkbox"/> Motors/Generators                     |
| <input type="checkbox"/> Chain & Chain Drives    | <input type="checkbox"/> Plastics                              |
| <input type="checkbox"/> Clutches                | <input type="checkbox"/> Pumps                                 |
| <input type="checkbox"/> Controls                | <input type="checkbox"/> Seals                                 |
| <input type="checkbox"/> Couplings & U-Joints    | <input type="checkbox"/> Sensors                               |
| <input type="checkbox"/> Fluid Power             | <input type="checkbox"/> Other: _____                          |

**Does the company own any part of a Power Transmission or Motion Control Distributorship or Manufacturers' Representative Company?** Yes ☐ No ☐

If yes, name of company: \_\_\_\_\_

**Is your firm's business predominately** ☐ Power Transmission or ☐ Motion Control?

**Do you sell through your own direct sales force?** Yes ☐ No ☐

If yes, where: \_\_\_\_\_

**Do you currently market through Manufacturers' Representatives?** Yes ☐ No ☐

**Do you currently have territories open for representation?** Yes ☐ No ☐

**Do you warehouse anywhere other than at your plant?** Yes ☐ No ☐

**Do you expect representatives to purchase your product for resale?** Yes ☐ No ☐

**Will you be willing to assist PTTRA in improving relations with manufacturers?** Yes ☐ No ☐

If no, please state your reasons: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**SPONSOR.** Please list your firm's PTTRA member sponsor: \_\_\_\_\_

Name: \_\_\_\_\_

Firm: \_\_\_\_\_



# PRINCIPAL MEMBERSHIP APPLICATION

Membership dues are based on your company's North American annual sales volume for Power Transmission/Motion Control Products. Dues cycle is 6/1-5/31.

## APPLICABLE DUES AMOUNTS:

<b>\$475</b> <\$2M	<b>\$650</b> \$2M-\$3.99M	<b>\$750</b> \$4M-\$5.99M
<b>\$875</b> \$6M-\$9.99M	<b>\$1,100</b> \$10M-\$14.99M	<b>\$1,300</b> \$15M-\$24.99M
<b>\$1,500</b> \$25M-\$49.99M	<b>\$2,000</b> \$50M-\$99.99M	<b>\$2,500</b> \$100M-\$499.99M
<b>\$3,250</b> \$500M-\$1B	<b>\$4,000</b> >\$1B	

Dues Amount: \_\_\_\_\_

Payment method: Check #: \_\_\_\_\_ (payable to PTRAs) enclosed.

Or, the following credit cards are accepted: ☐ Visa ☐ MasterCard ☐ American Express

Credit Card Account #: \_\_\_\_\_ Security Code: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ Signature required for Credit Card: \_\_\_\_\_

STATEMENT: Contributions or gifts to the Power-Motion Technology Representatives Association are not deductible as charitable contributions for federal income tax purposes. Dues payments are deductible by members as an ordinary and necessary expense.

See 10701 of the Revenue Act of 1987. PTRAs's Federal ID Number is 23-7267570

Signature of firm's representative: \_\_\_\_\_ Date: \_\_\_\_\_

# REPRESENTATIVE MEMBERSHIP APPLICATION

## Qualifications for Representative Membership in PTRA:

- All applicants must meet the qualifications of the Association's Bylaws. See **www.ptra.org** or call PTRA headquarters for a copy.
- Representative membership in the Association is open to independent manufacturers' representatives for power transmission and motion control equipment who sell primarily through distribution or to designated markets.
- Membership includes individuals and firms, such as sole proprietorships, partnerships and corporations.
- The applicant must represent at least two manufacturers in the product category and must operate under contracts or agreements for specific territories.
- The applicant must not be under the control of a distributor and must be free of financial control by any manufacturer.
- The applicant must also agree to comply with the Association's Code of Ethics as approved by the Board of Directors. *See page 11.*



## Send completed application along with dues payment to:

**PTRA**  
**5353 Wayzata Blvd. Suite 350**  
**Minneapolis, MN 55416**

**Phone: (888) 817-7872 or (952) 564-3051**  
**Fax: (952) 252-8096**  
**E-mail: ptrahq@ptra.org**  
**Website: www.ptra.org**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ ZIP+4/Postal Code: \_\_\_\_\_

Country: Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Web Site: \_\_\_\_\_

Year Firm was Founded: \_\_\_\_\_ ☐ Sole Proprietorship Partnership ☐ LLC ☐ Corporation

Number of Outside Salespeople: \_\_\_\_\_ Number of Inside Salespeople: \_\_\_\_\_

Name and Title of Firm's Primary Representative to the Association: \_\_\_\_\_

Spouse's name for the Directory: \_\_\_\_\_

Spouse's home address for special interest mailings: \_\_\_\_\_

# REPRESENTATIVE MEMBERSHIP APPLICATION

**Territory Covered** (Check all states/provinces served wholly or in part):

**US Territories:**

- |                                      |   |   |
|--------------------------------------|---|---|
| <input type="checkbox"/> Alabama     | <input type="checkbox"/> Kentucky       | <input type="checkbox"/> North Dakota   |
| <input type="checkbox"/> Alaska      | <input type="checkbox"/> Louisiana      | <input type="checkbox"/> Ohio           |
| <input type="checkbox"/> Arizona     | <input type="checkbox"/> Maine          | <input type="checkbox"/> Oklahoma       |
| <input type="checkbox"/> Arkansas    | <input type="checkbox"/> Maryland       | <input type="checkbox"/> Oregon         |
| <input type="checkbox"/> California  | <input type="checkbox"/> Massachusetts  | <input type="checkbox"/> Pennsylvania   |
| <input type="checkbox"/> Colorado    | <input type="checkbox"/> Michigan       | <input type="checkbox"/> Rhode Island   |
| <input type="checkbox"/> Connecticut | <input type="checkbox"/> Minnesota      | <input type="checkbox"/> South Carolina |
| <input type="checkbox"/> DC          | <input type="checkbox"/> Mississippi    | <input type="checkbox"/> South Dakota   |
| <input type="checkbox"/> Delaware    | <input type="checkbox"/> Missouri       | <input type="checkbox"/> Tennessee      |
| <input type="checkbox"/> Florida     | <input type="checkbox"/> Montana        | <input type="checkbox"/> Texas          |
| <input type="checkbox"/> Georgia     | <input type="checkbox"/> Nebraska       | <input type="checkbox"/> Utah           |
| <input type="checkbox"/> Hawaii      | <input type="checkbox"/> Nevada         | <input type="checkbox"/> Vermont        |
| <input type="checkbox"/> Idaho       | <input type="checkbox"/> New Hampshire  | <input type="checkbox"/> Virginia       |
| <input type="checkbox"/> Illinois    | <input type="checkbox"/> New Jersey     | <input type="checkbox"/> Washington     |
| <input type="checkbox"/> Indiana     | <input type="checkbox"/> New Mexico     | <input type="checkbox"/> West Virginia  |
| <input type="checkbox"/> Iowa        | <input type="checkbox"/> New York       | <input type="checkbox"/> Wisconsin      |
| <input type="checkbox"/> Kansas      | <input type="checkbox"/> North Carolina | <input type="checkbox"/> Wyoming        |

**Canadian Territories:**

- ☐ Alberta
- ☐ British Columbia
- ☐ Manitoba
- ☐ New Brunswick
- ☐ New Foundland
- ☐ Nova Scotia
- ☐ Ontario
- ☐ Prince Edward Island
- ☐ Quebec
- ☐ Saskatchewan

**International Territories:**

- ☐ Mexico
- ☐ Puerto Rico
- ☐ South America
- ☐ South Korea
- ☐ Virgin Islands

**Other:** \_\_\_\_\_

**Branch Locations** (List address and phone numbers of each; attach supplemental sheet if necessary):

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**List all manufacturers you represent.** Provide full name and address; attach supplemental sheet/line card if necessary. (This information is for the application process only and is not available to the membership.)

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**Complete the following:**

- A. Can you provide warehouse space? Yes ☐ No ☐
- B. Do you invoice in your company name? Yes ☐ No ☐
- C. Do you warehouse any lines? Yes ☐ No ☐
- D. List the names of the suppliers you invoice under your company name:
- 
- E. Is your business predominately ☐ Power Transmission or ☐ Motion Control?

**SPONSOR.** Please list your Firm's PTRAs member sponsor:

Name: \_\_\_\_\_

Firm: \_\_\_\_\_

# REPRESENTATIVE MEMBERSHIP APPLICATION

## PTRA Code of Ethics

The position of Manufacturers' Representative is unique in that the Representative is the liaison between the distributor, the original equipment manufacturer, the consumer, and the company represented.

As a power transmission/motion control advisor, the Representative upholds a high professional responsibility to the distributor and the original equipment manufacturer, and at the same time occupies a position of trust and loyalty to the company represented. Only by observing the highest ethical balance can the Representative avoid conflict between these responsibilities.

### As a Manufacturers' Representative, it is my responsibility to:

- Hold my business in high esteem and strive to maintain its prestige.
- Keep the needs of my distributors at the forefront.
- Respect my distributors' confidence and hold in trust personal information.
- Render continuous service to my distributors, customers and manufacturers.
- To employ every proper and legitimate means to persuade my customers to use the proper equipment for their application, if known, while strictly adhering to the highest standards of business and professional conduct concerning these recommendations.
- Present accurately, honestly and completely every fact essential to my distributors' and customers' final decisions.
- Perfect my skills and add to my knowledge through continuous thought and study.
- Conduct my business on such a high plane that others emulating my example may help raise the standards of my profession.
- Keep myself informed with respect to my manufacturers' policies, rules and regulations, and to observe them in both letter and spirit.
- Respect the prerogatives of and cooperate with all others whose services are constructively related to mine in meeting the needs of my distributors and customers.

Do you agree to comply with the Association's Code of Ethics? Yes ☐ No ☐

**Dues are \$415 per year for the firm (including the owner/president), plus \$50 per additional outside salesperson.**

**\$415**

for membership 6/1-5/31

+

**\$50**

per additional outside salesperson

Primary Dues Amount: **\$415**

Outside Salesperson Amount: (Number outside salespeople \_\_\_\_\_ x \$50) = \$ \_\_\_\_\_

TOTAL: \_\_\_\_\_

Payment method: Check # \_\_\_\_\_ (payable to PTRA) enclosed.

Or, the following credit cards are accepted: ☐ Visa ☐ MasterCard ☐ American Express

Credit Card Account #: \_\_\_\_\_ Security Code \_\_\_\_\_

Expiration Date: \_\_\_\_\_ Signature required for Credit Card \_\_\_\_\_

**STATEMENT:** Contributions or gifts to the Power-Motion Technology Representatives Association are not deductible as charitable contributions for federal income tax purposes. Dues payments are deductible by members as an ordinary and necessary expense.

See 10701 of the Revenue Act of 1987. PTRA's Federal ID Number is 23-7267570

Signature of firm's representative: \_\_\_\_\_ Date: \_\_\_\_\_