

## Daily Activities of the Production Engineer

TOWARD the prime purpose of this Manual, *what* we have to sell receives a lot of discussion because ours is a complex field, and we serve it with many thousands of manufactured items. *How* we sell our products, as to their uses and their competitive superiority, is likewise subject to many considerations. Thus we may expect to find the daily activities of the men who do the selling in the field to be equally varied.

This unit is specifically addressed to the newcomer in the Sales organization. It summarizes the more important subjects to be covered in his preliminary training before he goes out "on his own" into his assigned territory. As a summation of activities these paragraphs cannot attempt to cover *all* the details—indeed, no two veterans in the field have identical procedures or sales techniques. But the whole organization works within an established pattern, using tested tools of sales and advertising, conforming to major rules of operation without which no business could exist.

We proceed, then, in the second person, having in mind's eye the alert and ambitious young man who has just become a "trainee." From the start we salute you with "Howdy, Salesman!" You'll find yourself variously termed in the Company's letters and printed matter. You're a "Production Engineer"—a "Linotypeman"—a "Field Representative"—but it's *Sales* that permits your name to be on the payroll. As Linotype *Salesman* the end figures of your volume of sales and your costs to produce that volume will be the measure of your success.

As Linotype Salesman, when you are in due course sent out to cover an assigned territory, your activities will be varied and far from mere routine. You will be making constant use of:

1. Your understanding of the functions and needs of the newspaper, commercial printing, trade typesetting and other plants that operate in your territory. (See "The Sales Field" in this Manual.)
2. Your knowledge of the Linotype and its product, with all their adaptations and ramifications. (See "Product.")
3. Your familiarity with the established procedures and rules for handling Linotype business. (See "Business Methods.")

4. Your adaptability to the conditions of travel. (It's mostly every man for himself on this factor—with occasional advices from the Linotypeman who preceded you.)
5. Above all, your ability to SELL. (See "Sales Procedure" for a few indications of the variety, the interest, and the constantly developing challenges that will stimulate your ingenuity and bring zest to your day's work.)

The foregoing references cover only sections of this Manual. They approach the major divisions of your activities, for most of which the many items of Linotype printed matter provide particularly useful information since they are primarily addressed to your customers. Your knowledge of this printed matter and your daily uses of it will be covered further on in this unit.

The "Constitution and By-Laws" of your sales activities are tersely set forth in your personally-assigned-and-recorded copy of the Sales Book of Information and the Sales Data Book. You will study and refer to these sources from the start—but you will understand them better as your Linotype knowledge grows. Since this Manual avoids all possible duplication of other Linotype printed matter, your study of the Manual must assume your growing familiarity with *all* the related "literature."

Having thus briefly summarized the broader divisions of your sales activities, let's look at the more important details, remembering that we can only highlight them here and you will be developing your own individual experience with them as your work progresses.

### "Plan Your Work—Work to Your Plan"

FROM the territory assigned to you it will be your responsibility to produce a volume of sales satisfactory to your Company, at a cost, in your salary and expenses, that will be as low as possible. These objectives require that you so organize your activities that you can:

1. Systematize your work so that you can devote the maximum available time to selling.
2. So direct yourself and your sales activities that you will require a minimum of field supervision.



3. Promptly, accurately, and fully report your activities.
4. Maintain and build up good will.

You will have recognized by now that Linotype sales work in the field is highly *individual*. Wholly unlike the high-pressure crews, working under a field manager, who invade a trading center like a swarm of locusts to make a door-to-door canvass with some household appliance, your assigned territory is based upon your continuity of personal contacts with the plants within its boundaries. The accumulated experience of your Agency has enabled your Company Management to measure the extent of sales territories against the essential number of personal calls by Linotype Salesmen, at intervals sufficiently frequent to serve customers properly.

Obviously no two territories are alike in shape, in location of cities and towns, or in the exact content of plants that need Linotype products. Thus the routes and planning of travel are most important—and they, in turn, may be interrupted by some emergency development in the territory. These conditions necessitate individual planning by the Salesman, always with such advice as he may need from his Agency when major problems confront. Such planning usually covers several days, sometimes a longer swing of two or three weeks. But every day's routine must observe certain important elements of planning that must become instinctive, virtually automatic. They include:

#### *In Preparing for the Day—*

1. The selection of the customers and prospects to be seen.
2. The visualization of their needs and the planning of the right sales approach for each.
3. The day's travel plan, whether within one city or to cover several towns, to select the most direct routing, centralizing calls and avoiding back-tracking.
4. Checking the sales tools carried on the trip—order blanks, contract forms, and the proper variety and supply of printed matter.
5. Checking your automobile.
6. Determining, in advance, how the day may break to permit a period for planning and routine paper work.

#### *At the End of the Day—*

7. To plan ahead and write reports—if the preliminary planning didn't produce an earlier opportunity.
8. Always to review your day, analyzing your calls for the improvement of tomorrow's.

## **“Here's Your Territory”—the Prospect and Customer Index**

FROM your Agency's master record of all the plants within its boundaries (“the Rand”) you will be provided with a somewhat similar card index of the plants within your territory. For each plant (of whatever nature), whether a Linotype user, a user of other machines, or a prospective user, your index will contain a Plant Record card. Get one of these cards from the Rand Desk and study the basic information it provides. Note also that it becomes your basis of *timing calls*, since your notes on the card after making a call will serve as a future reminder. The date of call, person or persons seen, what the plant may need—these items, kept faithfully, are most useful in your further planning and repeated contacts.

For all extended territories, other than those in one large city, the Plant Record cards are arranged alphabetically according to cities, as are the correspondence files in your Agency and at Brooklyn. Within each single city and town, the cards are placed alphabetically by customer names. This aids complete coverage in planning routes, notably during your earlier stage of getting acquainted with your territory.

Careful maintenance of your Plant Record Index and its regular use in planning your sales routine will save untold mental stress (in trying to remember details) and will safeguard against failure to maintain contact with any plant through sheer oversight. (Of course, your Agency will be checking that contact factor, likewise.)

## **Preparing the Proposed Itinerary and Mail Information Form**

You have been hearing about the vital importance of your Agency's constant knowledge of your whereabouts. A customer may phone or wire requesting quick contact with you—any one of a dozen emergency developments may make it vital to reach you quickly by wire or phone. Thus you must *always* cover your movements, *in advance*, with the form which shows your travel plan and your stopping places where mail and wires can reach you.

This working information must be at your Agency at all times and sufficiently ahead of your movements to permit your mail to be forwarded effectively. Thus, if you are at some distance from your Agency, you should use Airmail to send in the Itinerary Form—otherwise regular mail.

*Any change* in your route must be likewise reported to your Agency—by wire if necessary.

As a trainee you will have watched the flow of this information at your Agency, noting how it enables the responsible sales executive to key the movements of the men in the field to the occasional emergency conditions



that are characteristic of this business. As a Salesman in the field, remember that "train dispatcher" back in the Agency! He may one day help you save an order.

### **Paper Work—Inevitable and Essential**

NOBODY likes reports and forms—but business can't function without them and Sales activities are actually a rather complicated series of contacts and developments, often spread out over months and even years. Thus one order for Linotype machines may be the outcome of a long period of study, cultivation, and many contacts. Its background of reports and memoranda will have been vital in shaping the final papers—and the incidental "paper work" will have demonstrated its value.

The experience of many years in Linotype's field operations has shown that Salesman is usually the most successful and the least subject to worry and strain who writes his Daily Reports *each day*. Sales routine becomes irksome only when its details pile up.

So your Agency says bluntly: "your reports MUST be written and sent to the Agency daily." Not only does this procedure relieve your mind of accumulated details, freeing it for the next day's work, but it provides at the Agency the up-to-the-minute picture of customer contacts which is so often necessary in an emergency.

### **The Daily Call Report**

THIS FORM highlights your day's calls with a quickly written summary that gives your Agency a picture of your day's overall activity. It parallels your entries on the Plant Record cards, used as the working basis of that day's work. Thus the cards themselves serve readily for the writing of this report.

If that *least satisfactory* means of calling on a customer (the telephone) was used, write T in the proper column and then write a full explanation on the Individual Call Report.

The telephone is useful to confirm appointments, to get information, to be of service to established customers with whom you are on a friendly basis, and to handle the details of orders when the relationship or the immediate circumstances justify it.

But you should NOT use the telephone to make a first contact with a new prospect, nor to discuss a financial matter with any customer, nor to handle a disgruntled customer.

Never use the telephone when a personal contact is possible. Remember how easy it is to say "no."

### **The Individual Call Report**

TO PRESERVE the sales picture in each plant in your territory, your reports of the calls made and the nature of each will enable the Agency to get that essential information from any customer's file at any time.

Your study of Agency functions will have shown you how these daily Call Reports circulate from desk to desk. Thus each department of the Agency can act as you may indicate, the data you forward can be entered in the appropriate records (as in the Rand), and the report then adds its content to the customer file.

The routing of each Call Report should be left up to the Agency, but if you desire you may mark a duplicate copy for the special attention of some individual.

When any change in plant personnel occurs you should indicate a covering change in the Mail List. This is another test of efficient coverage of a territory. Remember that Home Office mailings, as returned by the Post Office, are an indication of Mail List efficiency on the road, even though such mailings are sometimes retained regardless of address. Every mailing of the Linotype News results in such returns.

The essential developments of your call on a customer or prospect are keyed to the Rand, as you know. Thus the information to be transcribed on the Rand card should be noted in the Rand Resume box on the Individual Report form.

From the very beginning of your writing these reports you can conserve your own time and that of the Agency personnel by using brief, concise statements. Salesmen who expand a ten-line appropriate report into forty lines of elaborate and overly-detailed writing are the loudest complainers about "paper work." Here's an excellent use for good journalism.

### **Competitive Machine Activity Report**

COMPETITION, according to the popular saying, is "the life of trade." Naturally it's both the Number One Pain-in-the-Neck and a constant Bur-under-the-Harness of the Sales organization. But, just as military strategy must be based on the fullest possible information about the enemy's doings, so must we have all the details of competitive activity in your territory.

By a competitor we mean the Intertype Corporation, the dealers in second-hand machines, and any person or firm which sells or exchanges Linotype or Intertype machines. (We also thus classify the several manufacturers of such supply items as molds, spacebands, etc.—but we cover only competitive *machine* sales on the above report form.)

Any sale or order for a typesetting machine, effected in your territory by any person other than yourself or through Company procedures, is to be reported promptly. This report you will type in triplicate—one copy goes to the Agency Lost Order File, one to the customer's file, and the third to Brooklyn.

This report should be made as soon as you learn of such a development—do not wait until the machine is delivered. Preferably each such situation is to be covered *twice*—once when the order is placed or a deal has



been made, and later when the installation has been made and machine details can be secured.

For the individual machine records, which are vital statistics in the Company's business, you must obtain both the Serial Number and the Date of Installation affecting competitive installations.

This unhappy bit of procedure we certainly hope won't be a *daily* feature of your activities. But if and when the circumstances thus develop, you will recognize the Company's need for full data on competitive conditions and will be prompt and thorough in your reporting.

### The Proposal Information Sheet

SO THAT your Agency may be currently informed, and possibly take any supporting action to back up your efforts, you will summarize every specific sales proposal on this form. It is to be typed in triplicate, one copy held by you for further uses, and two copies sent to the Agency. Whether you have made verbal quotations to your prospective buyer or have submitted a written proposal, this Proposal Information Sheet must cover the details. And, if your proposal to the customer is written, make three copies of it in *addition* to the original—thus you can keep one and send two to the Agency with their two copies of the report.

The procedure here calls for your naming a follow-up date. This is considered at your Agency, together with the details of your proposal, and the Agency frequently makes further suggestions for your guidance in developing the proposal into a firm order.

Then, when the follow-up action is taken, your own copy of these papers will help refresh your memory on all the details.

### Your Expense Report

WHEN you study this report form you will fully appreciate that it was drafted by a veteran of the road. It is to be prepared in duplicate and mailed to the Agency twice monthly, at the end of the 15th and of the last day of each month. Mail the original to the Agency and hold the duplicate in your personal file against the rare emergency that the original should be lost in the mails.

The procedure outlined on the form gives the details as to individual entries. All the required data should be supplied in the "recapitulation" section.

All columns should be totalled, both horizontally and vertically—which becomes an automatic check on the accuracy of your additions.

Unless you happen to be located near your Agency send your Expense Report in by Airmail.

### Making Type Face Layouts in the Field

IT IS OFTEN necessary to accompany a sales proposal with a layout showing the type faces contained therein

and how they will run. You will discover that the more discriminating purchasers realize that the end-product they are buying is *type*. The variety of faces, how they run, and the efficiency of their use is the major objective of a machine purchase. That doesn't discount the merits or sales arguments embodied in the machines themselves—but very frequently type faces are of supreme importance.

To meet that sales need in the field, you will have been trained at the Agency in the procedure of preparing layouts of type faces. For your uses on the road you will carry along the essential materials: clip-sheet booklets, a pad of Linotype Representative's Work Sheets, a can of rubber cement, with line gauge and a pair of shears. Practice a few typical layouts, discovering particularly how to keep them neat and crisp—this facility will be useful to you from here on in.

You will find some customers who do not know type faces or, knowing a few names, cannot visualize them. Then a visual layout of their present faces becomes a useful start toward the sale of new faces, likewise shown in layout form.

When you've become really good at this art you can tackle the layout of a newspaper dress, pasting up front pages and others. But you'll have been told to call for Agency help on any such major problem until you've established yourself as a Field Typographer.

### Using Printed Matter in the Field

MANY a Linotype veteran has made it a cardinal principle to have some item of Linotype printed matter in his hand when he makes a call. If it chances to be so transient a piece as a proof of a current Linotype advertisement in a trade paper it is still a ready subject of introductory conversation, an easy basis upon which to build the call.

When the call has a previously discovered need or interest as its basis, then an appropriate piece of printed matter is even more desirable. "Sales aids" means just that—with pictures and carefully written, well-composed sales arguments neatly packaged for your effective presentation to your prospect.

Such field uses of Linotype printed matter require proper provision for an adequate supply to be carried in your car. Of course your Individual Call Report may ask for printed matter to be sent direct to the customer, or your Agency may lay out a campaign of mailings to meet the situation as you have pictured it. But your personal presentations can also be highly effective—so maintain a suitable and comprehensive "inventory" of printed matter in your car.

This need, in turn, emphasizes the importance of your study of each new item of advertising and sales promotion material as it comes out. Advance proofs of advertisements should reach you before the ads appear



in their scheduled publications. Advance copies of printed matter are likewise timed for your receipt *before* your customers see such mailings. The Advertising Bulletin that accompanies such advices to you summarizes the Company's publicity program—study it and use it in your selling.

### Your Contact with Trade Groups

THE CONTACTS which are so vital in sales work divide broadly into friendships and impersonal acquaintanceships. The latter naturally exceed the former—and friendships must be carefully weighed and maintained on a basis that will not embarrass business relationships. For example, your friendship with a composing-room foreman might readily cause antagonism by the plant superintendent if the latter happens to be the buyer and he feels you are *too* friendly with the foreman.

Among the many trade groups (the national organizations are discussed in "The Printing and Publishing Field") are highly valuable sources of enduring friendships and valuable acquaintanceships. You will therefore find it helpful to attend meetings of local groups. You should report to your Agency the dates of all meetings, etc., and the Agency Manager will advise you when to "cover" the regional meetings in the Agency territory—the press association conventions, mechanical conferences, and meetings of national organizations.

Occasionally one hears mutterings in some local trade group that "the supply men try to run our show." Sometimes this is literally true—with such local meetings dominated by an atmosphere of too much entertainment and too little organization program. The Linotype veteran guards against entanglements of that sort. He participates sufficiently in a few of the more important local groups in his territory to demonstrate his interest, and to cultivate friendships. But he lets it be known that his activities demand travel, that he can't concentrate his interests in one city or one group, and that he can best help the Industry with his status as a "roving ambassador."

In this phase of your relationships with your new territory the experience of your predecessors and the advice of your Agency Manager will be of prime importance. And your Manager will go into the details of Company policy which bear on memberships in trade groups.

### Your Automobile

MANY YEARS of transcontinental experience with automobile operation by Linotype field men led up to the present arrangement with Four Wheels, Inc. Your Company has found this to be definitely the most satisfactory basis for the individual and independent transportation which we must have.

The car provided for you by Four Wheels, Inc. is expected to serve completely both your business and your personal uses. Complete insurance is provided for your protection twenty-four hours a day and during personal or family driving on weekends, etc.

The necessary reports on your car mileage, gas and oil, and incidentals are, of course, essential elements of your daily expense and must be carefully detailed as indicated.

The full requirements of the contract for cars are explained in the folder "General Instructions for Operation and Maintenance of Leased Cars." Study this carefully, know its content before you take out a leased car, and keep the folder, for any reference needs, in the glove locker of your car.

Always carry with you the standard forms furnished by Four Wheels, Inc. to report accidents. When emergencies arise, phone or wire *collect* to the Chicago Offices of Four Wheels, Inc.

### Servicemen's Work in Your Territory

THE ERECTION of new Linotype machines is the prime activity for each Agency's service organization. During intervening periods the serviceman does repair and rebuilding work and is always subject to call for emergency service.

Your close cooperation with the service engineers is most important. You are the immediate contact with the customers, your knowledge of their plant needs will help the Agency in routing servicemen to conserve their time and expense.

In turn, these experts on Linotype mechanism and maintenance can be very helpful in building your own knowledge of the machine. They are often in a position to aid the cultivation of a prospective sale and generally to reinforce your own relationships in the composing room.

When your customer desires service work, cover such need with a detailed report. Outline the work to be done and whether parts have been ordered. If it becomes necessary to order parts *after* the serviceman has arrived and made his diagnosis, time is often wasted. Give thought to the service operations in your territory and help your Agency plan them constructively. This is a valuable phase of customer good will.

### Your Cooperation with Your Organization

JUST as your friendly relationships with the servicemen in your territory will definitely aid your own activities, so will a similar spirit help in every detail of your Agency and Company contacts.

You should become familiar with the line of organization and follow it carefully. Know where to go for help, instructions, and service. Make friends with the



other members of the Linotype family, promote the cooperation and mutual understanding that you hope to receive from them. Exchange ideas—go out of your way to help when you can.

Many of your organization contacts will be largely maintained through reports and memoranda. That places further emphasis on your ability to write effectively, concisely, and to reflect your own self and personality in these routine papers of the day.

Occasionally a Linotype field man, perhaps remotely stationed far from his Agency and still further from Brooklyn, has developed a style of writing reports, comments, and criticisms which has hurt his efficiency and his reputation in the organization. The wrong impressions thus conveyed have defeated, to some extent, the cooperation which is instinctively poured out to the man whose genial personality shines through his daily

reports. When such a habit develops (and there haven't been many in the Company's history), Agency and Home Office executives are surprised to find that the caustic writer is really a pretty good guy when he comes in from the road to talk things over.

In such a complex business as Linotype, where sales and shipments, contacts and service are always on an *individual* basis, your daily activities and your Company's daily activities are packed with infinite details. On these details depend the fulfillment of promises, the satisfaction of customers, your success as a Linotype Production Engineer. The most efficient lubricant for the smooth operation of a big business like ours is supplied by friendly feeling and the resulting cooperation throughout our Linotype family.

Good luck, Salesman!