



Southern Wholesalers Association

2023

# Profit Enhancement Institute

Tools & Techniques for High Performance Management



**An intensive two day seminar  
designed for Owners/Principals, Branch Managers  
and Mid & Upper Level Managers  
in the Wholesale/Distribution Industry.**

**March 1-2, 2023**

Atlanta Marriott Century Center/Emory Area  
2000 Century Blvd. NE, Atlanta, GA 30345  
404-325-0000

**Register 5 delegates and the 6th attends free!**

**REGISTRATION DEADLINE:  
February 19, 2023**

# SESSIONS

**WEDNESDAY, March 1st**

## **HIGH PERFORMANCE FINANCIAL MANAGEMENT**

**Dr. Al Bates**

With Dr. Bates' emphasis on "Profit Based Planning," you will use your company's own numbers to develop a customized plan for profit and controlling system. Managers will learn how to take a proactive approach to financial issues. **Please bring a calculator to this session.**

### **DEVELOPING A PROFIT PLAN**

- Find out how fast you can improve your company's results
- Identify your firm's areas for the greatest potential improvement
- Learn the difference between profit planning and cash flow planning
- Set targets for how much profit and gross margin your company should generate
- Develop realistic investment levels for inventory and accounts receivable
- Learn forecasting and expense control techniques that really work

### **CASH FLOW PLANNING**

- Target an appropriate growth rate for your branch or firm
- Examine sources of financing for growth
- Learn about the adjustments in inventory and accounts receivable needed to fund growth

### **STAYING ON PLAN**

- Make your profit plan the central focus of management
- Learn monthly control procedures for staying on your plan for profit throughout the year

**THURSDAY, March 2nd**

## **HIGH PERFORMANCE SALES & SALES MANAGEMENT**

**Michael E. Workman**

Dr. Workman shows you how to move away from traditional selling techniques based on product and price, and toward techniques based on service and value added - critical in today's intensely competitive market.

### **DEVELOPING A COMPETITIVE ADVANTAGE**

- Analyze your selling system - your customers & competitors, and your company's strengths & weaknesses
- Learn specific planning tools to implement effective sales methods

### **TEAM BUILDING TECHNIQUES FOR THE TOTAL SALES FORCE**

- Implement a vendor evaluation and management program
- Create prime account programs
- Take home usable concepts in coaching, recruiting, screening, selecting and motivating your sales force

### **BUILDING PERFORMANCE MEASUREMENT & COMPENSATION SYSTEMS**

- Evaluate your sales force with techniques that are tied to your company's profit strategy
- Explore the changing role of sales management in the industry
- Learn the most effective methods of compensation in use today
- Tie your compensation plan to overall company goals

# S P E A K E R S

*SWA's Board of Directors has spent considerable time selecting the subject areas for this course, as well as specific presenters. The Profit Enhancement Institute features nationally recognized speakers of the highest caliber.*

## DR. ALBERT D. BATES



Dr. Albert D. Bates is founder and Chairman of the Profit Planning Group, a research and executive education firm headquartered in Boulder, Colorado. The firm works exclusively in the area of corporate financial planning.

He makes approximately 100 presentations each year on topics such as Improving the Bottom Line, Getting Serious About Profit, Doing More with Less, and Pricing for Profit. He also provides strategic direction for the firm's investigation into profitability research for over seventy different trade associations.

He has written extensively in both the professional and trade press, including the Harvard Business Review, the California Management Review and Business Horizons. In addition he writes the quarterly Profit Improvement Reports for the firm's trade association clients.

Al received his undergraduate degree from the University of Texas at Arlington and his MBA and doctorate from Indiana University. While at Indiana he was one of the first recipients of the Ford Foundation Fellowships in Business Education.

He is married and has three grown daughters. Their college bills are still not paid off, which is why he gives 100 presentations a year. When he is not traveling giving seminars he enjoys tennis and skiing. He is not particularly good at either one.

**Please visit our website at  
[www.profitplanninggroup.com](http://www.profitplanninggroup.com)**

## MICHAEL E. WORKMAN



President of Michael E. Workman Associates Ltd., Dr. Workman has more than 40 years of experience in industrial distribution including channel optimization, research and education. He currently consults globally on distributor services, marketing, industrial sales, sales management, operations management, strategic planning, and succession planning and profitability improvement.

An accomplished author, speaker and instructor of management, leadership and business development programs, Dr. Workman has extensive experience in international training and research in wholesale distribution, distribution channel optimization, small business operations, distribution research and education, and global business systems.

A passion for education, Dr. Workman taught at Texas A&M University for twenty years and was named Professor Emeritus of the Industrial Distribution faculty in the college of engineering. He developed curricula, created course content, and helped initiate undergraduate and graduate programs in distribution for colleges of engineering and business at Baylor University, Purdue University, University of Nebraska, University of Alabama – Birmingham, TCU, and Western Carolina University.

President of Michael E. Workman Associates Ltd. since 1978, Dr. Workman consults with industrial distributors, manufacturers who sell through distributors, and industrial and contractor users of industrial products on local, state, national and global levels. He currently provides consulting for sales, marketing, negotiations, operations management, and strategic and financial planning.

# SEMINAR AGENDA

**Wednesday, March 1, 2023**

## **High Performance Financial Management**

7:30 a.m. - 8:00 a.m.	Coffee Break
8:00 a.m. - 9:30 a.m.	Profit Based Planning
9:30 a.m. - 12:00 p.m.	Developing a Profit Plan
12:00 p.m. - 1:00 p.m.	Lunch
1:00 p.m. - 2:30 p.m.	Developing a Profit Plan
2:30 p.m. - 4:00 p.m.	Cash Flow Planning
4:00 p.m. - 5:00 p.m.	Staying on Plan

**Thursday, March 2, 2023**

## **High Performance Sales & Sales Management**

7:30 a.m. - 8:00 a.m.	Coffee Break
8:00 a.m. - 12:00 p.m.	Developing a Competitive Advantage
12:00 p.m. - 1:00 p.m.	Lunch
1:00 p.m. - 2:00 p.m.	Team Building Techniques for the Total Sales Force
2:00 p.m. - 5:00 p.m.	Performance Measurement & Compensation Systems

## **HOTEL RESERVATIONS**

The Profit Enhancement Institute  
will be held at the:

## **Atlanta Marriott Century Center/ Emory Area**

2000 Century Blvd. N.E.  
Atlanta, GA 30345

**(800) 228-9290 or (404) 325-0000**

For reservations, call the hotel by **February 19th** and identify yourself as a participant in the SWA seminar to receive the special rate of  
**\$179.00** single/double.

## **REGISTRATION FEES**

**SWA Members: . . . . . \$699**

**Nonmembers: . . . . . \$799**

Fees include coffee & Danish each morning, and lunch on Wednesday and Thursday. Also included is the seminar workbook covering both sessions.

## **Property Location**

With a stay at Marriott Atlanta Century Center/Emory Area in Atlanta (Buckhead - North Atlanta), you'll be close to Oglethorpe University and Lenox Square. This hotel is within the vicinity of Legoland Discovery Center and Emory University.

Attendance is limited to 40 participants. The registration fee covers two days of educational sessions, two lunches, daily morning coffee with rolls, and breaks. Participants receive complete workbook materials and a certificate for completing the program. For additional registration forms, simply photocopy this page. **THE REGISTRATION DEADLINE IS February, 19th, 2023.** No cancellations will be refunded after this date (substitutions will be accepted). You can also go to [www.SouthernWholesalers.org](http://www.SouthernWholesalers.org) and sign up online. If you register and pay for 5 delegates you may bring a sixth for free!

## **PARTICIPANT INFORMATION:**

Name \_\_\_\_\_ Attendee Title/ Position \_\_\_\_\_  
Company \_\_\_\_\_ City and State \_\_\_\_\_  
Mailing Address \_\_\_\_\_ Confirm to: Name (if different) \_\_\_\_\_  
City/State/Zip \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

## **REGISTRATION FEES ENCLOSED:**

Enclosed with this registration form is a check made payable to SWA in the amount of \$ \_\_\_\_\_  
Representing the fees for \_\_\_\_\_ participant(s).  
Mail registration forms and checks to :

## **Southern Wholesalers Association**

P. O. Box 681966,  
Franklin, TN 37068  
**Phone:** 615.371.5004  
**Fax:** 615.371.5444  
**Web:** [www.SouthernWholesalers.org](http://www.SouthernWholesalers.org)  
**E-mail:** [Terry@SouthernWholesalers.org](mailto:Terry@SouthernWholesalers.org)  
**E-mail:** [Linda@SouthernWholesalers.org](mailto:Linda@SouthernWholesalers.org)

**REGISTRATION  
DEADLINE:  
FEBRUARY 19, 2023**

**REGISTRATION**