

### THIS WEEK

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### SPECIAL Focus REPORT

#### Corporate Team-Building

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### UTAH Focus

#### Utah's Legacy Businesses

In this edition.

Enterprise

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## MediConnect Global in process of hiring 100 more people

MediConnect Global, a South Jordan-based firm that serves the health care industry, is in the process of hiring 100 new employees across multiple departments, including software engineers, operations support and management, medical coders, account management, administration and executive assistants.

The firm's hiring expansion, which is immediate, reflects the company's steep growth trajectory, which is being driven by accelerating demand from the company's rapidly expanding client base.

MediConnect is a worldwide leader in two key industries within the health care sector. The company operates one of the largest — if not the largest — cloud-based health information exchanges in which it facilitates the retrieval, digitization, storage and delivery of medical records via the Internet. The service is utilized by clients in the health insurance, life insurance and legal industries as well as directly by consum-



ers and medical providers of all kinds. The addition of online document management and coding features have helped the company to establish a large and expanding client base, including four of the five leading health insurers in the United States.

In addition, MediConnect leverages its database of more than six million digitized records — the largest in the industry — to serve the consumer market with the personal health record (PHR) platform, myMediConnect. The online service also provides wellness resources, including an online dietician and fitness tracker. Combined, this system helps consumers to better manage their health records and their health. myMediConnect was one of only four PHR systems chosen by the U.S. federal government to participate in an expansive, ongoing Medicare pilot project with CMS.

see MEDICONNECT page 5

## 44 percent of site selectors expect economy to improve

The economy's gradual recovery during 2010 has resulted in increased business optimism and a refined set of selection priorities among site selection consultants, according to data from the 7th Annual Consultants Survey conducted by Area Development Online.

Of the 110 site consultants that responded to the 2010 Consultant Survey, 44 percent said they expect the economy to improve by 2012, while 38 percent said the economy will not

improve significantly until 2013.

#### Consultants' Site Selection Priorities

Area Development Online asked respondents in its 2010 Consultants Survey to rank each of the 26 site selection factors according to importance: "very important," "important," "minor consideration," or "of no importance." Labor costs and state and local incentives tied for the No. 1 site selection factor — both were considered "very important" or "important" by 96.8 percent of the respondents in the consultant survey.

More than half of the responding consultants said incentives are more important to their clients now than in the past. Nearly half believe tax incentives along with other financial incentives (grants, loans and the like) are the most important types of incentives. Nearly half said more communities are instituting investment and/

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#### Editor's note

In order to observe Memorial Day, *The Enterprise* will not publish the week of May 30. Regular publication will resume the week of June 6.

Please take a moment to reflect on the value of the men and women in our country's armed services.

## Utah's oldest Apple computer specialist sold to Simply Mac

By Barbara Rattle

The Enterprise

MacDocs, Utah's oldest Apple computer specialist, has been sold to Simply Mac, a Salt Lake City Apple retailer with seven stores in Utah and Wyoming.

The MacDocs store at 1435 S. State St., Salt Lake City, will soon bear Simply Mac signage, and 11 of the firm's key employees — the bulk of the firm's staff — have been retained, according to Simply Mac president Steve Bain. Simply Mac now employs 96.

MacDocs specialized in business sales and business managed services, while Simply Mac caters more to the consumer retail market.

"By acquiring them and



integrating their business service expertise, we're able to offer than to customers throughout the states where we have stores," Bain said, noting a Simply Mac location in Idaho Falls is expected to launch in June. "This helps us to get a faster jump on the increasing demand that we're seeing from businesses for Apple products and services."

Bain said that for the last two years, Apple products have been enjoying what the firm calls "consumerization of the computer."

"Ten years ago a CIO or a director of IT set mandated standards for what computers would be offered in the business," he

see MACDOCS page 5

## Fluid handling company to expand Utah footprint

By Barbara Rattle

The Enterprise

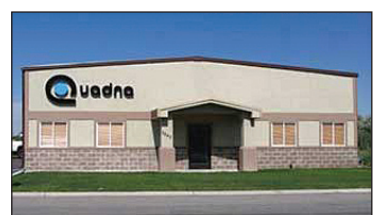
Quanda Inc., a Phoenix-based firm that designs, engineers, manufactures and services fluid and air handling pumps and systems, is preparing to significantly expand its Utah footprint.

Presently located in about 5,600 square feet in West Haven, the company has leased roughly 24,000 square feet at 2535 N. 1500 W., Ogden, where it plans to move in June, said Utah area manager Jim Jenkins.

A staff of eight will immediately be nearly doubled, he said, and while the new location will provide more space than Quanda currently needs, it opens the door for Houston-based DXP Enterprises, which purchased Quanda last year, to bring portions of its business to Utah, Jenkins said.

Quanda has outgrown its West Haven facilities, which were opened in May of 2009.

"We do Babbitt bearing repair for the power generation industry as well as service the mining and power generation



Quanda's current Utah facilities are in West Haven.

businesses for fluid handling equipment, pumping solutions," Jenkins said. "The new space is certainly bigger than what we need immediately but we expect to utilize some of the area for inventory because DXP is a new products distribution company as much as it is service and repair. There's some potential to expand our business into some of the other DXP core competencies, which are the safety business as well as bearings and power transmission. They've got a couple of other divisions that currently are not in Utah or west of here so that's how we anticipate utilizing some of the additional space."

Quanda has eight offices, seven in the States and an

see QUADNA page 2

## SELECTION

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or job creation criteria that must be met in order for their clients to receive the incentives. Forty percent said incentive closing funds are the factor they have found most deficient in their recent evaluations for location and expansion projects.

Two other tax-related factors placed among the consultants' top 10: tax exemptions ranked seventh, with an 88.4 percent impor-

tance rating, and corporate tax rates ranked ninth, with an 86.4 percent importance rating.

### Highway Accessibility

Among the site consultants, highway accessibility ranked third — considered “very important” or “important” by 95.8 percent of the respondents; however, among corporate survey respondents highway accessibility was ranked the most important site selection factor.

Fourth on the consultants' list of priorities was the availability of

skilled labor, with a 92.6 percent importance rating. This factor was in seventh position on the corporate respondents' list. Meanwhile, the right-to-work state factor dropped 9.9 percentage points to a 71.3 percent importance rating, and fell from 13th position in 2009 to 20th in the 2010 Consultants Survey — “the greatest drop in the rankings among the site selection factors,” according to Area Development Online.

The responding consultants ranked energy availability and

costs fifth among the selection factors with a 91.5 percent importance rating. Nearly half of the responding consultants say rising energy costs are impacting their clients' facility plans. Furthermore, nearly four-fifths say sustainable development is more important to their clients now than in the past; 80 percent of the respondents to the Consultants Survey said their clients are making energy-saving modifications to their facilities, and more than 40 percent said their clients are seeking LEED

certification for facilities, as well as recycling or re-using waste products.

The top 10 selection factors from Area Development Online's 7th Annual Consultants Survey are:

1. Labor costs
  2. State and local incentives (tied with labor costs as the most important factor.)
  3. Highway accessibility.
  4. Availability of skilled labor.
  5. Energy availability and costs.
  6. Proximity to major markets.
  7. Tax exemptions.
  8. Occupancy or construction costs.
  9. Corporate tax rate.
  10. Availability of buildings.
- Quality of life selection factors:
1. Low crime rate.
  2. Colleges and universities in area.
  3. Housing costs.
  4. Ratings of public schools.
  5. Health care facilities.
  6. Housing availability.
  7. Climate.
  8. Cultural opportunities.
  9. Recreational opportunities.

## QUADNA

from page 1

international office in Mexico. The company provides customized and innovative solutions to industrial, commercial and municipal customers for a vast array of oil, gas, power, water, air, sludge and chemical applications.

DXP purchased Quadna in April of last year for \$28 million. DXP is a leading products and service distributor focused on adding value and total cost savings solutions to MRO (maintenance, repair and overhaul) and OEM (original equipment manufacturer) customers in virtually every industry since 1908. DXP provides pumping solutions and integrated supply and maintenance, repair, operating and production services that emphasize its knowledge and technical expertise in pumps, bearings, power transmission, seals, hose, safety, fluid power and electrical and industrial supplies.



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## Omniture co-founder raises \$10 million for next tech venture

Utah entrepreneur Josh James, co-founder and former CEO of Omniture, has raised \$10 million in angel funding from some of the most esteemed visionaries and leaders in the technology industry. The angels include individual investors, venture capital firms that often participate in early-stage rounds, as well as individuals who were on the board of directors of Omniture, a Utah County-based SaaS company that was sold to Adobe in 2009 for \$1.8 billion.

A partial list of angel investors includes Marc Benioff, chairman and CEO of salesforce.com; Lars Dalgaard, founder and CEO of SuccessFactors; Mark Gorenberg, managing director of Hummer Winblad Venture Partners; John Pestana, co-founder of Omniture; Dan Rose, vice president of Facebook; Paul Sagan, CEO of Akami; S. Steven Singh, co-founder and CEO of Concur; and John Thompson, chairman of Symantec and CEO of Virtual Instruments.

The angel round will be used to fuel James' yet-to-be-unveiled venture that is solving what James calls a paradox in today's business intelligence market. James' company's temporary working name is Shacho Inc.

"We are fortunate to have attracted such high-caliber angels whose experiences and insights will help accelerate our aggressive plans for growth; and given what we are planning to do, it's apropos that we have CEOs and founders of

the four largest SaaS companies," James said. "Today's business intelligence solutions leave executives with blind spots because the information they receive is not real time and it's often inaccurate and incomplete. We are on an aggressive path to fix this pervasive problem that has yet to be addressed."

WPP, the world's leading marketing communications services firm, is a strategic investor in this round.

Shacho Inc. is a technology holding company founded in 2010 by James to address fundamental problems in the business intelligence market. As one of the first steps to deliver on his vision, Shacho bought Corda Technologies, and James is the CEO of the combined company. A new company name, strategy and solutions will be announced later this year.

James co-founded Omniture in 1996, took it public in 2006 at age 33 and sold to Adobe three years later. Under his leadership, Omniture was the first or second fastest-growing public software company three years in a row, and Omniture grew to become the second largest SaaS company, with \$400 million in sales and 1,700 employees. Prior to Omniture, James co-founded an interactive agency and two other businesses that were later sold to Jupitermedia and VeriSign.

## Archery business to open in Sandy

Full Draw Archery, a business that will retail archery equipment and supplies as well as provide an archery range, is slated to open its doors in June.

The company has leased approximately 6,400 square feet at 8385 S. Allen St., Sandy, and will be owned by husband-and-wife team Easter and Sean Brock in partnership with Brandon Jackman. All three are archery enthusiasts, according to Easter Brock.

She said Full Draw Archery will devote about half its space to the retail component, representing both Utah and national manufacturers, and the other half to the archery range. The cost to utilize the range has not yet been determined, but Brock said it will be "very reasonable." Full Draw Archery will also be certified to fix and tune archery equipment, she said.

"There's definitely a need here in Utah," according to Brock. "Archery is a huge sport in Utah and there's kind of a hole in the market. There are not a lot of places to go, so we said 'let's try

it.' Word of mouth will be huge for us, but we definitely plan to advertise, join the chamber of commerce, get involved in the community, be out at events.

The company leased its Sandy space with the assistance of Paul Westenskow, Mindy Ackerman and Kyle McMullin of Commerce Real Estate Solutions.

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## MEDICONNECT

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“We feel extremely fortunate that MediConnect is continuing to grow during such a tenuous time in the economy,” said Amy Rees Anderson, CEO of MediConnect Global. “We are bullish on where we are headed as a company and have worked diligently to become the best-positioned company in the market to capture and provide value to our clients. Our ability to stay one step ahead of the current trends in health care, which include the rapid emergence of personal health records for consumers and the demand for consumers to become more engaged in their own healthcare, enables MediConnect to excel at guiding both health payers and providers to meet this need.”

In the past six years, MediConnect’s revenue has grown more than 1,100 percent, ranking it No. 155 on the Deloitte Technology Fast 500 fastest-growing companies in North America. The firm has appeared on the Inc. 5,000 list for the past four consecutive years.

With offices in South Jordan and Ephraim, MediConnect Global employs approximately 1,000 people. MediConnect was started in 1996 and became MediConnect Global in 2006.

## MACDOCS

from page 1

said. “What’s happening now is that when Apple is talking with CEOs of Fortune 100 companies, the high-level, high power recruits are asking, ‘what technology are you going to provide for me, and do I have a choice?’ The employees are saying ‘I have a Mac at home, I have an iPad at home, I have an iPhone at home. I’d really like to have a Mac at work. Why do I have all this revolutionary technology at my house and when I come to work I’m issued a three-year-old PC from the guy I took the job from?’ That’s not a great on-boarding employee experience. We’re seeing that C level and top level officers of businesses are going to Macs earlier and we’re seeing that the front line new hires are requesting Macs. It’s kind of pushing in the middle of have people adopt Mac as an approved

standard for IT. Certainly the iPad and the iPhone have driven huge awareness for Mac products.”

MacDocs was founded in 1989. In 2001, the three individuals who sold the company to Simply Mac assumed control of the company.

Simply Mac will host a grand opening event for the public on July 22 from 9 a.m. to 1 p.m. at the 1435 S. State St. location. The first 100 customers in line for the event will receive a gift bag containing merchandise from Simply Mac.

Simply Mac was founded in August of 2006. Its stores offer sales, a personalized customer training program branded Simply Answers, and warranty service and repair for Apple products. Simply Mac also offers a used computer trade-in program and has a two-person business sales and service team to meet the needs of local business clients.

## More venture cap deals for Utah in 2010 than during prior year

Utah enjoyed the highest number of deals during a four-year period in 2010, with 149 deals reported in the 16th annual MountainWest Capital Network (MWCN) Deal Flow Report released May 19 at the Utah Deal Flow Event.

According to the report, 149 deals took place among Utah businesses — 118 funded by venture capital, angels and seed stage investment; 27 merger and acquisitions; and four public offerings. In 2009 there were 126 deals; in 2008 there were 141 deals; and in 2007 there were 131 deals.

Except for mergers and acquisitions, all deals increased in 2010.

“It appears we are steadily up-ticking out of the economic recession we’ve been experiencing over the past few years, but on the other hand we can see that the recession has heavily affected

both acquisition and exit opportunities nationally and in Utah,” said Matthew J. Thorne, chairman of MWCN Deal Flow committee.

Highlights from the 2010 report:

- There were 118 financing deals reported in 2010, an increase from 94 deals reported in 2009. While the number of financing deals increased, total investment dollars dropped from \$660 million in 2009 to just over \$400 million in 2010.

- Mergers and acquisitions activity remained slow in 2010. There were 27 M&A transactions with a total valuation of approximately \$2.8 billion.

- There were four secondary or other public offerings totaling \$470 million in 2010 compared to only one in 2009.

The Deal Flow Report is published each year by MWCN.

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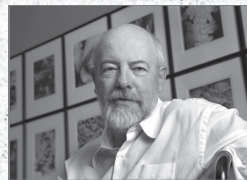
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## • Industry Briefs •

### BANKING

• **Frontier Bank**, Salt Lake City, has promoted **Don Rudy** to senior vice president and market manager. Rudy has been with Frontier Bank since 2003 as vice president, senior lender/team leader. He currently serves on the board for Crossroads Urban Center.

### COMMUNICATIONS

• **The Utah Telecommunications Open Infrastructure Agency (UTOPIA)**, the community-owned fiber optic network, has begun **expanding its network** and adding 400 institutions in eight Wasatch Front cities to UTOPIA's broadband fiber optic network. The institutions include schools, health care providers, public safety agencies and government facilities. The infrastructure expansion is being financed by \$16 million of recently received economic stimulus funds from Broadband USA and ARRA, the American Recovery and Reinvestment Act.

• **Xmission**, a Salt Lake City-based Internet service provider, is launching a **new line of business phone services**. Transitioning to Xmission allows businesses to replace traditional analog office phone systems, or enhance their existing private branch exchange phone system with additional functionality. Xmission's business phone service starts at \$39 per line, per month, with a two-year

contract that includes a phone lease, and can also provide auto-attendant, work-anywhere options and hunt groups, which automatically forward to the next available operator.

### CONSTRUCTION

• **Mike Holland** of **R&O Construction** has earned his **LEED certification**. He has been with R&O Construction since 1998, and is a senior estimator and project manager for the company's Federal Group. LEED is a third-party certification program and the nationally accepted benchmark for the design, construction and operation of high performance green buildings.

• **BHB Consulting Engineers**, Salt Lake City, has been selected as the structural engineer for the **Murray City School District Seismic Evaluations**. The project involves a seismic analysis and cost estimate of nine district schools: Grant Elementary, Liberty Elementary, McMillan Elementary, Viewmont

Elementary, Riverview Junior High School, Horizon Elementary, Longview Elementary, Parkside Elementary and Hillcrest Junior High School.

• The Associated General Contractors of Utah has awarded a **2010 Platinum Safety** award to **R&O Construction**, a general contractor headquartered in Ogden. The award honors contractors for safety ratings 25 percent

below the national average. This is the second year in a row that R&O has achieved a platinum rating.

• **Kurt Dallinga**, P.E., RCDD, CTS, acoustical and technology engineer for **Spectrum Engineers**, Salt Lake City, was named a top young professional in *Engineering News Record Mountain States* magazine's 2011 Top 20 Under 40 issue. The Top 20 Under 40 program recognizes young professionals in the architecture, engineering and construction industry who have earned the respect of their peers and the industry by taking on responsibility and leadership roles within their firms and contributing to the growth of the industry. Dallinga designed audio-video and voice/data systems for the restoration of the historic State of Utah Capitol, and has won many national and regional engineering and design awards.

• **Peak Performance Roofing**, Sandy, has been awarded the status of **Master Elite Contractor** by **GAF Materials Corp.**, the larg-



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• **ARW Engineers**, a structural consulting engineering firm in Ogden, has promoted **Matt C. McBride** and **Jeremy L. Achter** to junior associate, and **Robert Moyle** and **Justin D. Naser** to associate. Moyle, Naser, McBride and Achter have been with ARW for more than 10 years. In addition, **Troy M. Dye** has been named a shareholder of ARW Engineers. Dye has been with ARW since February 2002.

**EDUCATION/TRAINING**

• **Rowland Hall**, a private school in Salt Lake City, has been awarded a \$2 million grant from **The Malone Family Foundation** to award scholarships to gifted students who are new to the school. Rowland Hall is the only school in Utah and one of seven schools in the U.S. to receive the grant this year. The Malone Family Foundation is a national foundation whose mission is to improve access to quality education, particularly at the secondary school level, for gifted students who lack the financial resources to best develop their talents. Schools do not apply for the grant, but are chosen for eligibility from a complement of independent schools across the nation that meet Malone criteria.

• **Western Governors University**, a Salt Lake City nonprofit online university, has achieved **enrollment of more than 25,000 students** and a cumulative total of 10,000 graduates. The school is designed to meet the needs of adult learners and uses a mentor-guided, competency-based learning model that allows students to advance by demonstrating their knowledge rather than logging time in class.

**ENVIRONMENT**

• Installation of **new solar panels** on the 70,000 square foot building that houses the customer service call center for **Zions Bank** and other Zions Bancorporation affiliates will help reduce the company's power consumption. Zions worked with **Alpenglow Solar LLC** to install 130 solar panels for a 29,900 watt system that will take up 20 percent of the 35,000 square foot roof space. The panels will allow Zions to avoid an estimated 28.2 tons of carbon dioxide emissions annually, which is equivalent to the greenhouse gas emissions from five passenger vehicles each

year, or the CO2 emissions from 2,863 gallons of gasoline consumed. Funding for the project was offset by a \$50,000 grant through the Utah State Energy Program and other tax incentives for clean energy.

• **Kennecott Utah Copper** has received the **Outstanding Leadership in Energy Efficiency and Conservation** award from the **Utah Association of Energy Users (UAE)**. The award is for the proposed repowering of Kennecott's coal-fired power plant to run on natural gas through a combined cycle natural gas turbine, doubling the plant's efficiency rating and reducing emissions. Kennecott was nominated for this UAE award in recognition of Kennecott's overall leadership and proactive energy strategy.

**FINANCE**

• Utah-based entrepreneurial accounting firm **MainStreet Tax and Accounting Services** is launching **The Refund Recovery Program**, a risk-free tax return review program with a mission to put millions of dollars back into the hands of local entrepreneurs, starting with an initial goal of \$1 million by January 2012. The program allows taxpayers to find out how much money they unknowingly left at the IRS over the past three years and then claim it. For more information, visit [norefundleftbehind.com](http://norefundleftbehind.com).

**GOVERNMENT**

• **John Whittaker**, a front-load commercial truck driver for Salt Lake County, was named **Driver of the Year** in the Public Sector Category from the Environmental Industry Associations, the national trade association representing for-profit companies in the waste and recycling services and equipment industry throughout the United States. Whittaker drives 750 miles over city, suburban and rural streets, averaging about 170 stops per week. He has never experienced a preventable accident and has been recognized as

a team leader with a positive attitude toward fellow drivers.

**HEALTH CARE**

• Four physician executives with ties to Utah have been named among **Modern Healthcare's "50 Most Influential Physician Executives in Healthcare."** Those physicians are" Charles Sorenson, M.D., president and CEO of Intermountain Healthcare; Brent James, M.D., chief quality officer of Intermountain Healthcare; Arnol Milstein, M.D., MPH mem-

ber of Intermountain Healthcare's volunteer board of trustees and professor of medicine at Stanford University; and James K. Lassetter, M.D., chairman and CEO of Salt Lake City-based Medicity.

• **Tod F. Peterson**, a 23-year veteran of **Gold Cross Services**, has been appointed vice president of the corporation. He will continue to oversee all safety issues, purchasing, legal matters and facility management for the company's Utah operations. Peterson has held several positions during his tenure

with **Gold Cross**, including state and federal compliance officer, director of operations and maintenance and manager of property holdings. He most recently served as director of safety.

**INSURANCE**

• **Emma Crandall** of **GBS Benefits Inc.** has achieved **Wellness Council of America (WELCOA) faculty status**. Crandall completed four WELCOA

*continued on page 9*

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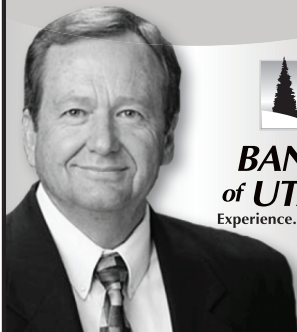
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## • Calendar •

• May 23, 8 a.m.-2 p.m.: **Thirty-Third Annual Utah Taxes Now Conference**, presented by the Utah Taxpayers Association. This year's conference title is "Using Return on Investment to Make Sound Public Policy." Leaders from the Utah State Senate, House of Representatives, Governor's office, policy experts and community leaders will cover a broad range of tax issues, including "Does a Better Economy Mean Bigger Government?" "Medicaid Reform — Reality is NOT Negotiable," "Legislative Session 2011: The Year of Education Reform," "Ding Dong! The Police Fee is Dead!" and "Restaurant Tax: Maverik vs. McDonalds." Location is the

Little America Hotel, 500 S. Main St., Salt Lake City. Cost is \$100 for Utah Taxpayers Association members, \$125 for nonmembers. Space is limited to 300 attendees. Register at [www.utahtaxpayers.org](http://www.utahtaxpayers.org).

• May 24, 8 a.m.-noon: **"Employment Law in the Trenches: Arming Your Front Line,"** sponsored by The Employers Council. Council attorneys will provide a basic overview of major employment laws and tips for avoiding trouble. Topics to be covered include key Utah employment laws, ADA and Workers' Comp, hiring and references, overtime pay and exemptions, discrimination, harassment

and retaliation, employee privacy and drug testing, leave laws, and employment at will and terminations. Location is the Radisson Hotel, 215 W. South Temple, Salt Lake City. Cost is \$125 for council members, \$199 for nonmembers, full breakfast buffet and materials included. Register at <http://ecutah.org/employmentlaw.pdf>.

• May 24, noon-1:30 p.m.: **Second Annual Ethics Conference: A Master Class in Business Ethics**, hosted by the Marriott School of Business at Brigham Young University. The luncheon and panel discussion will include presentations from national and international experts. Location is the BYU Hinckley Alumni and Visitors Center on the BYU campus in Provo. Cost is \$15. Register at <http://ce.byu.edu/cw/ethics/lunchDiscussion.cfm> or by calling 877-221-6716.

• May 25, 8:15-10 a.m.: **Export-Import Bank of the United States Business Briefing.** David Josephson, regional director of Ex-Im Bank in Irvine, Calif., will brief attendees on "Increasing Your Export Sales is as Easy as 1-2-3," and will focus on how to use the U.S. government to increase export sales; how to extend credit to international buyers, protect against nonpayment and free up credit for other business, and how to obtain working capital loans with U.S. government backing to help fulfill export contracts. Location is the Salt Lake Community College Miller

Campus, 9690 S. 300 W., Sandy, Miller Corporate Partnership Center building, Room 333. Free. RSVP in advance by calling (801) 957-5336 or emailing [stan.rees@slcc.edu](mailto:stan.rees@slcc.edu).

• May 26, 8:15 a.m.-1:30 p.m.: **Zions Bank's 10th Annual Trade and Business Conference.** Keynote speaker will be former President of Colombia Álvaro Uribe. The conference will also focus on global and domestic economic trends, international risk and overseas opportunities for Utah companies. During the event, Zions Bank will also honor the recipient of the "Global Pacesetter" award, a distinction given annually to a Utah company demonstrating international success. Location is the Downtown Marriott, 75 S. West Temple, Salt Lake City. Cost is \$35 and includes lunch. Seating is limited. Register online at [www.zionsbank.com/conference](http://www.zionsbank.com/conference) or by calling (801) 844-8573.

• June 2, 11:30 a.m.-1:15 p.m.: **"A Passion for Revenue Growth — World Class Sales Principles,"** an industry luncheon presented by the Utah Technology Council. UTC chairman Alan E. Hall, co-founder and managing partner of Mercato Partners, will be the speaker. Hall currently serves on the board of directors of MediConnect Global and serves as board advisor to Control4 and Fusion-io. Prior to founding Mercato Partners, Hall was founder and CEO of MarketStar Corp., an outsourced global marketing and sales organization that helped 30 of the world's largest high-technology companies generate billions of dollars in revenue from the small to medium business space. Location is the Rose Room at Thanksgiving Point, 3003 N. Thanksgiving Way, Lehi. Cost is

\$35 for UTC members, \$50 for nonmembers. Register at [www.utahtech.org](http://www.utahtech.org).

• June 8, 3-6 p.m.: **Credit Fest**, presented by the Association for Corporate Growth-Utah. The event is geared toward emerging and established middle-market companies and the professionals who support them. Speaker will be economist Dr. Kelly Matthews. A lender panel discussion will include Lorry Pitcher, senior vice president at KeyBank; and Dean Luikart, regional vice president of commercial banking at Wells Fargo. They will share their vision of the future of the economy and the state of the bank lending market. Location is the Little America Hotel, 500 S. Main St., Salt Lake City. Cost is \$30 for ACG members before June 3, \$45 thereafter. Nonmember cost is \$45 before June 3, \$60 thereafter. Register at [www.acgutah.org](http://www.acgutah.org).

• June 9, 8 a.m.-4:30 p.m.: **"InsideOut Coaching,"** presented by InsideOut Development. Participants will learn how to implement a simple and repeatable coaching process that can be applied in a variety of situations; how to coach others to maximize potential by creating awareness, setting goals and creating focused action; help others develop action plans to increase performance, establish accountability and increase productivity; navigate difficult conversations with more confidence and greater accountability, and communicate feedback in fast and effective ways. Location is the Marriott Salt Lake City Center, 220 S. State St., Salt Lake City. Cost is \$449 (there is an early bird discount of \$429 until June 2), or \$399 for two or more. Register at <http://www.insideoutdev.com>.

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from page 7

certifications dedicated to improving the health and well-being of working Americans. She consults locally with GBS clients to assist and advise them in establishing and operating their own wellness programs, which encourage their employees to adopt healthier lifestyles, thereby reducing their health care costs.

• **Ryan Clark**, a Salt Lake City resident, is the winner of **Guardian Life Insurance Co. of America's "Be a Guardian Hero" incentive program**, a new national initiative designed to reward agency personnel who refer qualified, talented individuals to join the Guardian team. Clark will donate the \$10,000 prize to the American Heritage School and Family Education Center, an independent nonprofit institution and one of the longest operating Latter-day Saints-oriented elementary and secondary schools in the nation.

**MANUFACTURING**

• **Amano Artisan Chocolate**, based in Orem, has received top honors from the London Academy of Chocolate. Amano received five awards for its chocolate, including one gold, three silvers and a bronze as well as a sixth for packaging. The company will be recognized at the annual Academy of Chocolate awards ceremony at Fortnum and Mason, Piccadilly,

London, England.

**MEDIA/MARKETING**

• **Intrepid**, a Salt Lake City-based hybrid communications firm, has been named by **Taubman Centers** as public relations agency of record for **City Creek Center**, the retail component of the City Creek mixed-use development in downtown Salt Lake City. Intrepid will provide strategy, media relations, event coordination and messaging for the approximately 800,000 square foot shopping and dining center. City Creek Center, which opens March 22, 2012, will be anchored by Macy's and Nordstrom stores and be home to 80 retail shops and restaurants, and is part of the 23-acre City Creek master plan developed by City Creek Reserve Inc.

• **Kevin Marasaco** has joined **HireVue**, a provider of video interviewing solutions, headquartered in Salt Lake City, as chief marketing officer. Most recently, Marasaco was vice president, brand and digital marketing for San Francisco Bay-based Taleo.

**OUTDOOR PRODUCTS/RECREATION**

• **Emily Summers** has been promoted to the position of communications manager at **Deer Valley Resort**. Summers has a BA from the College of Communication,

Arts and Sciences at Michigan State University and has served as Deer Valley's communication coordinator since 2006. She is experienced in coordinating the public relations and communications efforts of Deer Valley, including special events, social media and maintaining relationships with luxury travel, ski industry and other local and domestic media outlets. She has served on the Park City Chamber Bureau's public relations marketing advisory committee as well as Ski Utah's public relations committee.

**PHILANTHROPY**

• **The Buckner Co.**, an insurance company headquartered in Salt Lake City, has been chosen by EMC Insurance Co., one of its insurance carrier partners, to nominate a worthy nonprofit organization to participate in **EMC's 100 Ways of Giving campaign**. The Buckner Co. awarded each organization a \$500 grant. Those organizations were: Enable Utah; Friday's Kids; Good News Jail and Prison Ministry; Guadalupe School; Heritage Schools; House of Hope; Humane Society of Utah; Inclusion Center for Community and Justice; NAMI Utah; The Children's Center; The Children's Theatre; Treehouse Children's Museum; Snake River Animal Shelter; South Valley Sanctuary; Utah Food Bank; YCC of Ogden/Northern Utah; Youthline.

**REAL ESTATE**

• **Frances Hayes**, Salt Lake City area Realtor for **Coldwell Banker Residential Brokerage**, has been honored with the company's **Presidents Award**. Hays was chosen for the award in honor of her outstanding support of Coldwell Banker Residential Brokerage and the Salt Lake community. Hays has received numerous awards and recognitions for sales production and customer service throughout her career. She has been the No. 1 agent in the Sugar House office for the past 10 years.

• **Mike Hillis**, CCIM, SIOR, managing partner at Commerce Real Estate Solutions, Salt Lake City, has been elected international vice president of the **Society of Industrial and Office Realtors (SIOR)**. Hillis has served on the SIOR board of directors and executive committee for the past three years, and most recently held the position of speaker of the council of chapter presidents, where he presided over the 46 international chapters of SIOR. He also currently serves on the SIOR Professional Standards Committee and is a trustee on the SIOR Foundation.

• **Stuart Thain**, Realtor for the Salt Lake City office of **Coldwell Banker Commercial**, has been named the **No. 1 sales professional** for the company.

Thain has been with Coldwell Banker Commercial for the past six of has a 25-year career in commercial real estate. Thain and his team represent prominent landlords in the Intermountain West as well as a variety of national retail tenants, including Costco, Scheels Sporting Goods, JC Penny, Barnes and Noble, DSW, Ross Stores, Limited Brands, Christopher and Banks, GNC, Buffalo Wild Wings, Dave and Busters and Paradise Bakery.

**RESTAURANTS**

• **Costa Vida Restaurants**, a chain of fast casual dining restaurants with locations in Utah, has added new **gluten-free menu options**. Glutens have been removed from all sauces, dressings, meats and selected desserts.

**RETAIL**

• Salt Lake City entrepreneurs **Harry Leibovich** and **Fernanda Leibovich**, owners of **Sears Hearing Aid Center** at 754 S. State Street in Salt Lake City, earned the 2010 Platinum Club award from the **Miracle-Ear** franchise organization. Miracle-Ear presents the award to the top franchisees in its network for achievements in adhering to compliance standards and excelling in four weighted sales performance categories. The contest is Miracle

*continued on page 17*



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# SPECIAL *Focus* REPORT

## Corporate Team-Building

### Corporate team-building primer

By Anne Thornley-Brown  
MBA, President  
Executive Oasis International  
<http://www.executiveoasis.com>

Before you plan your corporate team-building session or executive retreat, it is important to be clear about your objectives. Remember you need the steak *and* the sizzle. It's an organization you're running, not a social club, so keep that in mind when determining the best course of action. Far too often, companies end up disappointed in team-building sessions and corporate retreats because expectations were not clearly identified and articulated.

#### Examples of Team Building Objectives

- Forge stronger alliances between geographically dispersed teams.
- Fine-tune your marketing and sales strategy.
- Reduce friction and "turf wars" between organizational levels and departments.
- Improve communication between teams and departments.
- Improve your decision-making process.

cess.

- Identify strategies to reduce red tape and duplication of effort.
- Brainstorm and generate new strategies to resolve business issues and overcome challenges.
- Manage projects more effectively even within tight timeframes.

Then, think carefully about whether or not team-building is really appropriate. Select your program based on your objectives, not just because a particular activity sounds "cool."

There is a place for team recreation, socials, picnics, etc. The key is to be clear about what you're doing. Don't call it team-building just to have an excuse to party or next year maybe that budget will disappear.

#### Planning Considerations for Team Building

Once you are clear about your objectives, it is important to determine:

- Number of participants.
- Level of participants.
- Budget.
- Time frame.

• Special dietary requirements, including allergies.

- Physical disabilities and constraints.
- If you will require assistance with location scouting.

#### Selecting the Right Location for Team Building and Corporate Retreats

Your choice of location can make or break your corporate team-building session or executive retreat. Let your objectives and theme drive the location selection decision, not vice versa. Determine if you will require assistance with location scouting. An experienced team-building firm should be able to help you find a location to fit your budget. However, it does take time to call around, check availability and come up with just the right fit. It is not kosher to expect consultants to do your location scouting for free or to do the event on your own or use the location suggested by one team-building service provider (for free) and give the business to another.

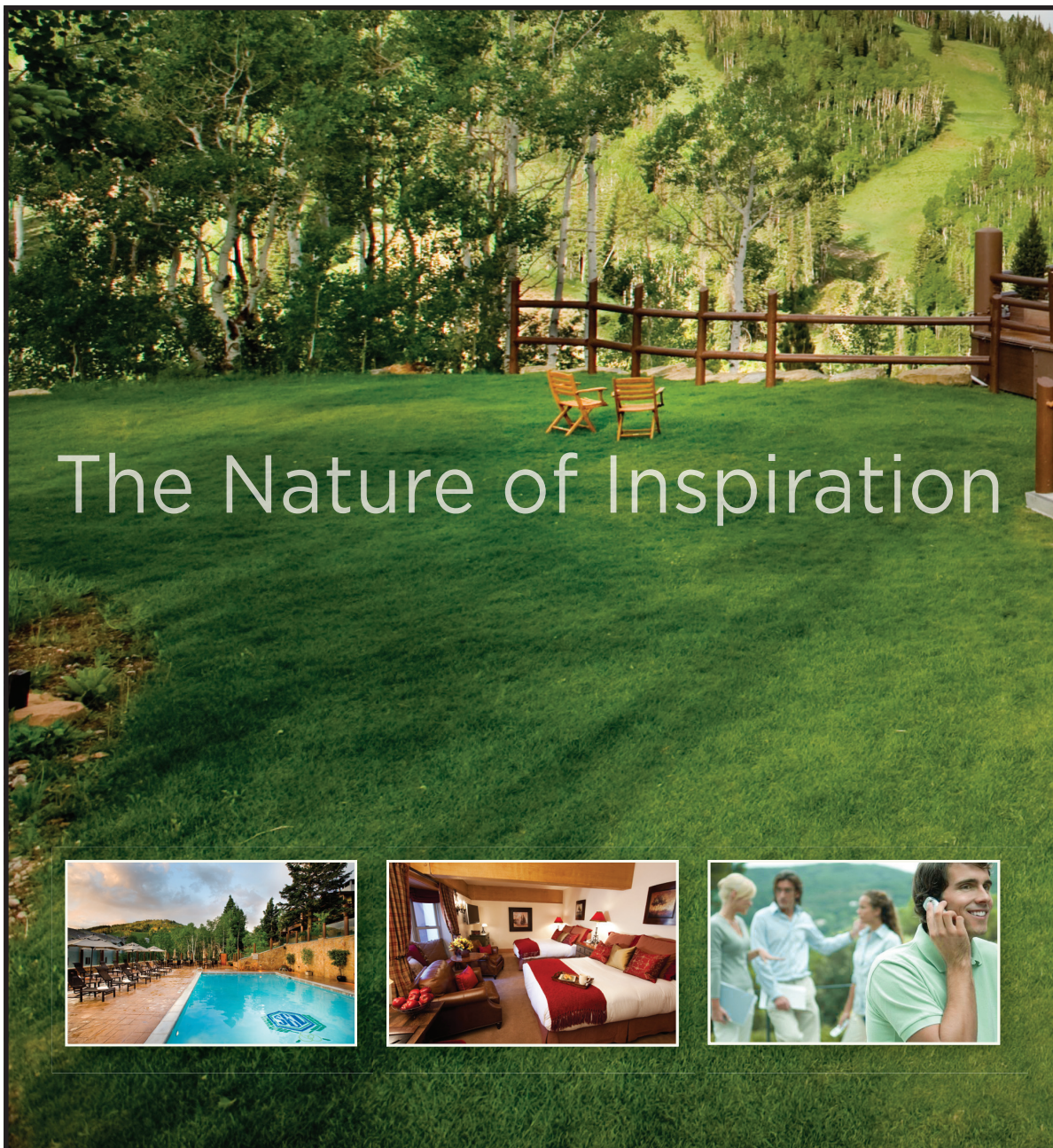
If your budget is limited, scout around. You may be able to find some unique and cost-effective locations for your events. You

can stretch your budget by using children's camps during off-peak season, amusement parks, acting studios, the catering department of community colleges to save on the cost of refreshments, movie theaters, camp sites and conservation areas. To save money on location, it is important to book your session well in advance — three to four months in advance. To book a group camp site and shelter, you would need a five to six month lead time.

#### Choosing Your Theme

One of the best strategies for "spicing up" your team-building sessions and corporate retreats is to come up with a theme. Based on your theme, you can select an appropriate venue, energizers, session starters, music, video clips, graphics for slides and handouts and menu items. The key is to let your objectives and content drive the theme. To come up with your theme, create a mind map. Put your content and topics in the center and come up with as many themes as possible that relate to your topics.

#### Selecting Your Teams



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There are a number of factors that you should take into account when you select your teams:

- Mix departments.
- Mix geographical regions.
- Mix organizational levels.
- Form team-based on learning styles.
- Give team members who don't get along with each other an opportunity to work together.

• Give the newer or more junior members of your team an opportunity to serve as team leaders.

#### Corporate Team Building Pitfalls

To ensure that you get value from the time and money invested in each session:

• Clarify what you want to get out of your team-building session or corporate retreat *before* you contact prospective facilitators or vendors.

• Don't schedule your session to end on a Friday. Like it or not, focus will become a challenge as the day wears on.

• Do allocate more time for your session if your group is highly analytical. They need more time to debrief and apply the session to your specific business challenges or they will leave feeling frustrated and that the session was a waste of time. "What was that?" will be a frequent comment on your feedback forms.

• Don't splurge on food and accommodation and scrimp on facilitation fees. You need an experienced facilitator to execute a session successfully.

• Don't just go through the motions of team-building. Team recreation is important. If your goal is a day off work, then

schedule a picnic or recreational activity.

#### Alcohol: Don't Let it Flow Freely

Watch the booze. Again it comes down to priorities and liability. Many companies are not aware of the fact that if they allow the liquor to flow freely before an activity that involves physical exertion, your company could be held liable if there is an accident. Certainly there is nothing wrong with a glass of wine with dinner. However, if participants will be driving after your corporate event, hire a bartender who is trained to detect potential problems and turn off the tap when appropriate. You might also want to have a backup plan and provide a taxi or hotel accommodation for any participants who do become inebriated. Some corporate retreat facilities now prohibit the sale and consumption of alcohol due to concerns about safety and skyrocketing insurance premiums. Even if there are no legal consequences to allowing things to get out of hand, the negative publicity would not be worth it.

One way in which you can promote the responsible consumption of alcohol is to have a wine tasting (or wine and cheese reception) and gourmet cooking class as part of your corporate retreat. An experienced facilitator can guide your team in a discussion and exploration of responsible consumption of alcohol at company functions.

#### Put a Leash on the Libido

During some corporate retreats, excessive consumption of alcohol can lead to poor judgment and sexual indiscretions. Some companies don't realize that they are

skating on thin ice when they turn a blind eye to dirty jokes, sexual innuendo and employees skinny dipping in the pool on a corporate retreat or at a sales rally.

#### Corporate Team Building:

##### Setting Expectations

Develop a code of conduct and make expectations clear. Have every employee review and sign off on it as part of your hiring process. Review it at orientation and in management development and diversity training programs. Some banks have employees review and sign off on the code of ethics and conduct once a year as part of the performance management process. Make it clear to managers that they put the company in jeopardy when they participate in or overlook certain behavior. If there is a breach, management must deal with it immediately and decisively so that there is no perception that the company condones what has happened.

##### Setting a Realistic Time Frame

Sometimes, companies are totally unrealistic about the time frame for a retreat. It is surprising how many people think that they can do a full-blown simulation with debriefing, application exercise, and a presentation by a member of the senior management team in half a day. Let me stress this in bold.

**A half-day simulation with adequate time for debriefing and business application exercises is just not doable.** The only way that it can work is if the simulation or activity is very simple, short and focused and you have one very clear and specific objective or core message that you want to convey. A facilitated and focused brainstorming ses-

sion is also doable in half a day. Of course, you can always find team-building companies that will take your money and promise you the moon within a half day or even two-hour timeframe. Buyer beware. Of course, if your goal is strictly recreational, that is doable in half a day or two hours.

To determine an appropriate time frame, you also need to consider if there are other items that you need to include in your agenda. A number of the companies include vendor and client presentations, departmental presentations and presentations about plans for the upcoming year into their corporate retreats and team-building sessions. The key is to determine the content, *then* select the appropriate timeframe, venue and recreation, not the reverse.

#### Corporate Team Building:

##### The Bottom Line

Team-building sessions and corporate retreats can be enjoyable. Team-building simulations, accelerated learning programs and corporate events can be loaded with the "fun factor," but there has to be value in terms of bottom line results.

See the next page for a team-building ROI calculator, and page ? for team requirements.

Anne Thornley-Brown is president of Executive Oasis International, a Toronto-based management consulting firm that helps companies succeed even in the midst of turbulence. The firm specializes in team-building retreats and also offers incentive travel and luxury corporate events to reward corporate teams.

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**Team Building Requirements**

**Clarify the following information with the decision maker (person who has signing authority) prior to requesting quotes.**

<b>Preferred Dates &amp; 2 Other Options:</b>		<b>Preferred Length of Session:</b>	<input type="checkbox"/> 3 Days <input type="checkbox"/> 2 Days <input type="checkbox"/> 1 Day	<input type="checkbox"/> 1 Day Plus an Evening <input type="checkbox"/> 2 Days Plus an Evening <input type="checkbox"/> 1/2 Day (Not Recommended)	<b>Notes</b>
<b>Preferred Location:</b>		<b>Purpose of Team Building Session:</b>	<input type="checkbox"/> Combination of Business Outcomes and Recreation <input type="checkbox"/> Planning/ Strategy Session <input type="checkbox"/> Strictly Recreational <input type="checkbox"/> Other: _____		
<b>Number of Participants:</b>					
<b>Positions, M/F, Age Group, Physical Fitness:</b>		<b>Objectives:</b>			
<b>Decision Making Process:</b>					
<b>Decision Making Criteria:</b>  (Add to Chart on Page 2)		<b>Approximate Budget and What it Includes:</b>	Total: _____ Per Person: _____ <input type="checkbox"/> Event Planning <input type="checkbox"/> Facilitation <input type="checkbox"/> Recreational Activities	<input type="checkbox"/> Travel <input type="checkbox"/> Accommodation <input type="checkbox"/> Meals	

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# When does it make sense to purchase real estate?

When a company experiences significant growth, or perhaps has added a new line of business, inadequate real estate space can be challenging, and can even get in the way of productivity. That's one of the many reasons that businesses must face the dilemma of whether to buy real estate or to continue leasing. Before making a decision, it may be helpful to look at the question from a banker's point of view to determine if it is economically advantageous to lease or buy.



**Cari Fullerton**

After scouting out a new site that makes more sense due to the potential for increased retail foot traffic, more production space, nearness to important resources or convenience, here's how to calculate if buying will be cost effective. As an example, we will say this new space costs \$500,000 to buy, and it will have a mortgage

with payments of \$25,000 per year with monthly payment of \$2,083. To get the whole picture, one must add \$2,500 per year for taxes and approximately \$1,500 for annual insurance. Building maintenance could cost another \$3,000. And then there is the one-time down payment on the property; an SBA 504 loan requires 10 percent down, so that's another \$50,000 for the first year. That's a total of \$82,000 for the first year.

Using this formula, a business owner can get a general idea of what the short and long-term costs might be to buy real estate. The bottom line is, if a lease payment exceeds a mortgage payment, buying might be a good option. However, there are other factors that play into the decision. Below are some pros and cons for this scenario.

- **Cash Outlay.** Even if a business can front a down payment and cover the initial outlay of cash, there are also costs for appraisals, building inspections, loan fees and other costs. The business owner will have to determine if the money needed to invest in a new location would be better invested somewhere else in the business.

- **Fixed vs. Variable Costs.** Mortgage payments will remain consistent in five or 10-year increments, but the market often dictates increased lease payments, which can increase annually or with three and five year adjustments.

- **Taxes.** Owning and operating a commercial property can provide tax deductions such as mortgage interest, property taxes and more. Lease payments are often fully deductible, but improvements have to be written off over a 39-year period. A business operator would be smart to consult an experienced banker or

CPA to make sure he/she is fully taking advantage of tax deductions.

- **Property Management.** When one buys a building one becomes a property manager as well and will be responsible for maintenance, rental of un-used space, etc.

- **Appreciation.** Owning a building provides the opportunity for making a profit on its sale. Ownership also creates the advantages and disadvantages of renting out unused space. This might provide additional revenue, but it also creates work above and beyond running one's business.

- **Retirement Fund.** Owning commercial space can serve as a retirement fund of sorts, as the building can be sold years down the road. Leasing (and thus building no equity) potentially places that money into someone else's retirement fund.

- **Lease Rates are Low.** Currently, Utah commercial lease rates are low, compared to what one might build or purchase. And, if one finds themselves in a situation where they must buy, it's most likely cheaper to buy an existing building rather than building a new one. There is commercial space available that was built when labor and material costs were high due to demand. The market has changed and now the price to build has come down. According to recent statistics, rent occupancy is off by 30 to 35 percent.

Probably, the best reason to buy real estate is if the perfect configuration is not available for rent, and one's business requires room for specialized equipment and work space. Be aware that banks will find it difficult to finance tenant improvements to a building that a business does not own. If the borrower can't offer collateral and the landlord benefits from the improvements, a bank may be reluctant to finance those improvements. So in that sense, it would be better to buy a building and customize it to fit one's needs, if there is nothing suitable to lease.

It's obvious that there are many things to consider before making a decision to buy or lease real estate. A business owner can call upon his or her banker and CPA to help analyze all the pros and cons and take a realistic look at the costs involved. If a company owner decides to move forward to buy a building, the bank may suggest getting a Small Business Administration 504 loan.

The SBA 504 is an economic development program that sup-

see PURCHASE page 17

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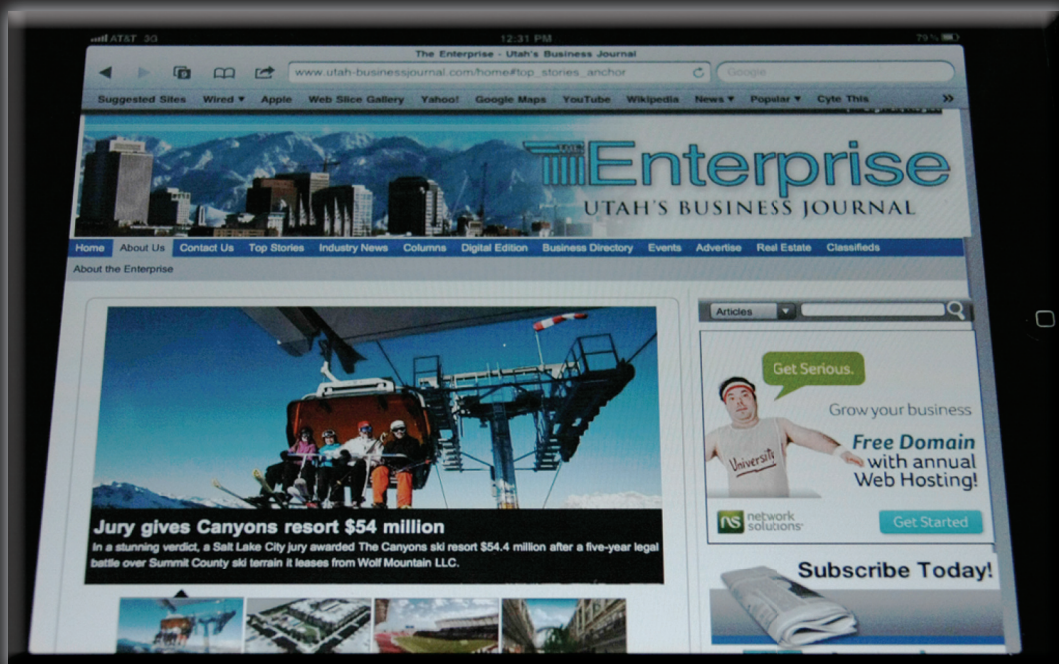
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from page 9

Ear's longest running contest among franchisees.

- A new **Walmart** has **opened in Ogden** at 1959 Wall Ave. The new store employs 300 associates and features enhanced service and a layout designed to make shopping more convenient for customers. It includes energy-efficient technology and environmentally friendly features to reduce energy and water consumption and minimize waste. The store's skylights reduce the amount of energy required to light the store by up to 75 percent daily. LED lighting in the store operates 70 percent more efficiently than traditional fluorescent lighting.

- Utah-based **Standard Optical**, an eye care and eyeglass business, has been recognized as one of the **Top 50 U.S. Optical Retailers** by the national trade publication, *Vision Monday*. The publication's rankings were based on U.S. sales revenue in 2010. Standard Optical ranks number 27 on the list for the second consecutive year.

**SCIENCE**

- An experimental water quality monitoring kit based on technology developed by **USTAR** professor **Marc D. Porter** and University of Utah researcher **Lorraine M. Siperko**, was recently **certified as operational hardware by NASA**. The kit, the Colorimetric Water Quality Monitoring Kit, uses Colorimetric Solid Phase Extraction technology to monitor the biocides molecular iodine and ionic silver in the potable water supply on the International Space Station. The kit utilizes a commercially available handheld device that weighs 1.1 pounds and operates on four AA batteries to collect data and provide direct readout of analyte concentration. Complete analyses can be completed in about two minutes, providing the crew a near real-time indication of whether or not adequate disinfectant levels are present in their drinking water.

**SERVICES**

- **Alphagraphics Inc.** will change the leadership team at its headquarters in Salt Lake

*continued on page 19*

Summons by Publication in the Third Judicial District Court in and for Salt Lake County, State of Utah: PEAR SPERLING EGGAN & DANIELS, P.C., v. CHAD L. SAYERS, ET AL. THE STATE OF UTAH TO DEFENDANTS CHAD L. SAYERS; PSNET, INC.; AND PSNET COMMUNICATIONS, INC.: You are hereby summoned and required to answer to the Complaint on file with the above-entitled Court. Within twenty (20) days after service of this Summons, you must file your written answer with the clerk of the above-entitled Court at 450 South State Street, Salt Lake City, Utah 84111, and to serve upon or mail to Walter A. Romney, Jr. of Clyde Snow & Sessions, Attorneys for Plaintiffs, 201 South Main Street, Suite 1300, Salt Lake City, Utah 84111, a copy of said answer. If you fail to do so, judgment by default will be taken against you for the relief demanded in said Complaint, which has been filed with the Clerk of said Court.

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**PURCHASE**

from page 15

ports small-business growth. It provides long-term, fixed-rate financing for acquisition and or renovation of capital assets, including land, buildings and equipment. Most for-profit businesses qualify for this program including retail, service, wholesale and manufacturing. SBA loans are designed to help companies with a net worth under \$8.5 million, a net profit after taxes under \$3 million, or companies that meet specific size standards.

The 504 loan is a two-tiered financing program; a lender finances approximately 50 percent of the project costs and receives a first lien on the projects assets, but no SBA guarantee. A local Certified Development Company may finance up to 40 percent of the project costs (backed by a 100 percent SBA guaranteed debenture) secured with a junior lien on the project. The borrower provides the balance of the project's costs.

Most borrowers are required to put down 10 percent of the loan, which allows the business to conserve operating capital. An additional 5 percent is required if the business is a start-up or less than two years old. If the real estate is to be used for a single purpose, the SBA will require an additional 5 percent.

Figuring out all the details and requirements for financing a new real estate acquisition can make one's head spin. Call a local banker experienced in commercial real estate for help in sorting them out. For more information about

SBA 504 loans visit [www.sba.gov](http://www.sba.gov)

Cari Fullerton is senior vice president and a commercial real estate team leader for Bank of Utah. Fullerton has worked for the bank for 14 years, starting in 1987 as a bank examiner with the Office of the Comptroller. She oversees all commercial real estate lending for Bank of Utah's northern division. Fullerton received her finance degree with an economics minor from Montana State University.

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## The 100-year path to sales is over. Road closed.

We are in the year 2011 and it's amazing to me that people are still cold calling, leaving voice mails, asking for appointments, and, in general, trying to pull out their Felix the Cat tricks that were dead and gone the moment the Internet reached awareness. (No offense, Felix.)

Why on earth would someone let you in to see a decision-maker on a cold call?

Why on earth would someone return your cold call voice mail?

Why on earth would someone grant you an appointment to make a sales pitch from a cold call?

Why on earth would someone listen to your time-worn sales pitch/tricks without a hint of value coming from you?

Why on earth would you look for your prospect's pain when he or she is looking for pleasure?

Why on earth would you try to sell your prospect, when *all they want to do is buy*?

Every day I receive sales questions via e-mail, on my website, through my social media platforms and from phone calls to my office. ALL of them focus around how to do something new with a strategy that is 100 years old.

- How do I overcome objections?
- How do I make a better cold call?

- How do I leave a better voice mail on a first call?
- How do I close a sale?

Most of the people asking these questions only have nine Twitter followers. Maybe less. Maybe none. Or maybe they aren't even on Twitter, and that's why they're stuck on the old path where the road is blocked, forever.

And worse, you get angry at me when I tell you what to do and how to win.

If you're stuck in the '80s, the best answer I can give you is to buy (or invent) a time machine, set it for 1980, and go back and live there. You'll have 10 years to hustle and struggle.

REALITY: The days of selling the old way are not only gone, they're annoying! Not to me. They're annoying to your customer and your potential customer.

Ever hear of referrals?  
Ever hear of testimonials?  
Ever hear of networking?  
Ever thought about speaking at civic organizations?

Ever thought about writing a column for the local business weekly or your industry trade publication?

If you spent the same amount of time earning referrals as you do making cold calls, your numbers would increase, you'd close more sales, your

aggravation factor would drop to zero, you'd make more money, you'd be infinitely happier on the job and your job happiness would skyrocket (in spite of your boss).

And those answers require ZERO technology.

Now, take a look at what's new.

Here are some of the new attraction and value-based strategies from the past 10 years:

- Your personal website with your philosophy about how you treat customers.
- Your personal blog with posts of interest.
- Your business Facebook page with customer interactions.
- Your video testimonials on YouTube.
- Your LinkedIn connections.
- Your once-a-day value tweet.
- Your weekly value e-mail magazine.

BIG PICTURE: Attract leads, earn referrals. They are 100 times more powerful and more profitable than the common cold call.

ACTION PLAN: Study your customers one at a time. It's the first step to understanding them and their needs. Let them Google you and be impressed.

CAUTION: If you go into a sales appointment sounding like you know everything, it can only embarrass you (and exclude you). If you haven't done the research, you'll look like an unprepared fool. When you have information from the Internet about the person and his or her business, it will help you formulate questions and generate ideas — the real elements of selling in today's world.

THE NEW WORLD OF SALES: The Internet and business social media are the new order of selling. They're the new frontier. But first, you have to believe it's worth it, resolve to make a plan, dedicate yourself to hard work for a year and discipline yourself to daily execution.

RESULT: A value-based sale, not a "lowest price/lowest profit" transaction.

And just to be clear, these strategies are not new. All of them are already being used. Hopefully not by your competition.

Jeffrey Gitomer is the author of *Social BOOM!*, *The Little Red Book of Selling* and *The Little Gold Book of YES! Attitude*. President of Charlotte, N.C.-based Buy Gitomer, he gives seminars, runs annual sales meetings and conducts Internet training programs on selling and customer service at [www.trainone.com](http://www.trainone.com). He can be reached at (704\_333-1112 or [salesman@gitomer.com](mailto:salesman@gitomer.com)).

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Jeffrey Gitomer

## Common dining mistakes

Today, more business is done while dining than ever before. Sales can be lost and careers short-circuited when poor table manners are displayed. Remember, your table manners are a gift you give those with whom you dine. They also indicate whether or not you know how to show respect for others.

The following are the most common mistakes noted while dining.

**Placing personal items on the table.** Never place anything on the table — purses, glasses, cell phones, briefcases, papers or accessories.

**Bringing food or drink from another business.** It is rude to bring a drink or food with you from another establishment.

**Turning over cups or glasses.** Never rearrange your place setting or turn over coffee cups or drinking glasses. This is offensive to everyone, your host and other guests.

**Chewing ice.** Is noisy and unprofessional.

**Touching your hair, face, etc.** From the time you meet your guest, refrain from touching your hair, face, ears, nose and, most important, your mouth.

**Licking anything.** Licking your fingers or utensils is the number one faux pas at any meal.

**Wiping off silverware.** This sends a mixed signal to your guest that you feel the restaurant is dirty.

**Misusing silverware.** Gripping the fork and knife incorrectly is the most obvious and common faux pas. Knives are meant to cut, not saw. The fork and knife should never teeter half off the plate onto the table. Don't wave your silverware in the air while talking. Silverware placed at the top of the plate is for dessert. Place only the silverware that you have used on the plate when finished. Place your silverware down between bites.

**Gesturing with silverware.** Silverware is used to place food in your mouth. Once that is accomplished, place your silverware down and chew your food and visit with your guests. Gesturing or holding silverware in your hands is not appropriate.

**Using the wrong butter plate.** There is a simple rule to remember: liquids to the right, solids to the left. Your butter plate will be near your fork, not your knife.

**Buttering an entire roll.** Bread and rolls are meant to be torn, not cut. A large roll would be torn in half first, then a smaller piece can be torn off, buttered and eaten. Toast is the exception. The entire piece can be buttered at once.

**Improper use of the napkin.** The napkin comes off the table only after everyone is seated. It is used to dab the lips, not scrub the face. If leaving the table temporarily mid-meal, place the napkin on your chair. At the end of the meal, place it on the table next to your plate, but never on the plate.

**Eating too fast or too slow.** Pacing is important when dining with others. Slow down if you notice you're faster than everyone else. Speed up or leave some food if you're a slow eater. You should never leave your guest to dine alone, which happens if you're finished way ahead of your guest.

**Showing food in mouth.** This happens when you've taken too big of a bite and then chew with your mouth open, or continue to talk. This is very unappetizing for others to observe. Small bites are necessary when trying to converse while eating.

**Seasoning food before tasting.** Without tasting your food, how would you know it really

needs seasoning? This can be seen as an insult to the chef and host. It also can indicate that you jump to conclusions.

**Washing food down with liquids.** The mouth should be cleared of food before beverages are sipped. It's a good habit to get into, especially with wine. Wine is meant to cleanse the palate and its taste can't fully be appreciated with food still in the mouth.

**Passing food incorrectly.** The salt is always passed with the pepper. Anything with a handle, such as the creamer, is passed so the handle is facing the person receiving the item. This is why the correct way to pass food the first time around is to the right = counter-clockwise.

**Leaving lipstick marks.** Lipstick should be well blotted so not to leave marks on cups and glasses. It's a real turnoff.

**Grooming at the table.** This is another turnoff. Don't touch your hair or apply makeup while at the table. And certainly don't pick your teeth at the table. Excuse yourself

from the table to remove something from your teeth or to apply makeup.

**Poor posture.** Sit up straight, don't lean on your elbows or forearms, don't rock in your chair, and keep your elbows close to your body.

**Making noise.** Eating food should be a silent activity, especially if you are in a group with a luncheon speaker.

**Blowing on food.** Don't blow on your food if it's too hot — wait a moment until it cools off.

**Asking for a doggy bag.** It just isn't done and comes across as tactless.

### Dining Etiquette Questions

• *Should you pick up your fork if it falls on the floor?* No. Leave it there; tell the server and ask for another fork.

• *Spilled food or drink etiquette.* Quickly pick up the fallen glass, and if the spill is going to run off the table, place your napkin over it. Get the server's attention and ask him or her to bring you a fresh napkin, then finish covering the mess. If your spill gets onto another person's clothing, it is very important that you offer to get the affected garment cleaned.

• *Signaling etiquette.* Look at the server quietly and say "waiter" (or "waitress.") If he is across the room and you can catch his eye, gently raise your hand to shoulder level and motion to him. At no time is it appropriate to call out to a server or to wave frantically (unless it's an actual emergency).

• *Should a man stand as a woman excuses herself to leave the table?* In business, the basic rule of thumb is to keep things gender neutral. If you wouldn't do it for another man, don't do it for a woman. That said, if a man is at a meal with an elderly woman or a client who would clearly appreciate his standing as a gesture of respect, then he should be all means do it. As with so much of dining etiquette, a little common sense goes a long way in making the right choice.

• *Is it acceptable dining etiquette to blow your nose at the table?* Really, it's not. (The one exception is a quick, slight dabbing, not blowing-of the nose). Any blowing of your nose into a tissue should take place away from the table, preferably in a restroom. Don't even think about sitting at the table and blowing into your napkin, or a tissue, for that matter. Both sneezing and nose-blowing should be followed by a quick visit to the restroom to wash your hands



Ellen Reddick

see REDDICK page 21

# The 10 principles that separate top sales performers from the rest

Have you ever paused and pondered why some salespeople are so much better than others, or why someone in your organization or industry is recognized as the top salesperson? What makes the difference? What are the defining characteristics that make one person better or worse than another in the sales arena? Why aren't you at the top of the performance ladder instead of someone else?

I know the answer and I'm going to tell you. I'm going to make it simple, and discuss sales success in plain terms that you can understand. I'm going to present the answer to sales success in the form of 10 basic, time-tested and proven principles that have made the difference between sales superstars and typical average salespeople.

Now, to further clarify these 10 principles, it is not just in knowing these principles that makes the difference. They must be applied diligently and consistently — that is what the top sales performers do. I don't want you to mumble to yourself, "I know that." Knowing something doesn't make any difference in sales performance. Consistently doing, using and applying these principles is the only way you will become a top performer, because that is what top performers do.

**Principle No. 1 — Desire.** You've got to want it so badly that you will do whatever is legal, honest and moral to achieve success. Top sales performers have a desire to succeed that is so compelling that they will even do those things they don't like to do because they know that those are the very things that will allow them to succeed. You must have a purpose in your life that will drive you to do those things when your motivation is low and discouragement is high. Your purpose needs to be greater than the pain of sales activities.

**Principle No. 2 — Knowledge.** Many people enter into the field of sales thinking it is something easy they can do to earn a living. They don't realize that success in sales requires training, studying and years of learning. After all, who attends college to learn sales? Business or marketing maybe, but not sales. You might think that selling is easy; all you need to do is just declare yourself a salesperson and then go out and sell. Nothing could be further from the truth. The very best salespeople have prepared themselves to be the best. They have studied, practiced, role-played, rehearsed and sacrificed to earn top honors. Successful salespeople have invested years of hard work to earn the title of top sales professional. Top performers know their products and can answer questions and concerns directly, or know where to find the answers. Top salespeople are full of knowledge, not BS.

**Principle No. 3 — Time Management.** Most salespeople never have the time or the organizational structure to do those things that will allow them to be successful. Sales success doesn't just happen because you get up in the morning or because you hope it will happen. Sales success is the result of planning and scheduling to do those things that will bring you success. Sales success for top sales professionals is the result of following a game plan designed to give victory on the "playing field of sales" when other less successful sales people believe all they need to do is just "show up". Top sales performers plan, schedule and perform meaningful sales activities during every 30-minute increment of time in their sales day.

**Principle No. 4 — Dress For Success.** If you want to be a top sales performer you must dress like one. When you dress for success you will develop an attitude of success. It is very difficult to focus on selling if you are thinking about your appearance. Your whole demeanor will change when you dress appropriately for your audience. Your prospect will pay greater attention when your dress and grooming suggest that you know what you are talking about. You should dress for your audience, which means you may present yourself differently to each prospect based on their industry and market. Top salespeople have the look of success. I heard a radio talk host referring to Mitt Romney the other day. He said, "Mitt looked presidential." Salespeople need to dress in such a way as to cause people to think or say "you look successful."

**Principle No. 5 — Hard Work.** Plain and simple, selling is hard work if you are going to be a top income earner. There is a common perception that salespeople have a pretty easy job. They are gone all the time, no one ever knows where they are, and sales just happen. Successful salespeople work hard every minute of every hour of every day. They work hard

at doing the right things. Successful salespeople never arrive at a point when they don't have to work hard. The harder they work the more money they make, and they don't stop working just because they have made a few bucks. Successful salespeople don't just fall into sales or get lucky. What you might think is luck, is the result of hard work and consistent daily effort.

**Principle No. 6 — Consistency.** The consistent erosion of the Earth by the mighty Colorado River formed the Grand Canyon. It wasn't eroding the Earth occasionally; it was a consistent daily effort over a long period of time. Too often salespeople find a great opportunity, only to squander it due to lack of consistent follow-up. Top sales performers are consistent in every aspect of the sales process. They value each opportunity as a potential sale and believe that through applying the correct principles on a regular basis they will have success. Day in and day out, successful salespeople religiously follow their sales process, knowing they will ultimately realize the reward they seek.



Tim Huffaker

**Principle No. 7 — Attitude.** I can't think of a profession wrought with more rejection and potential discouragement than sales. Eighty-four percent of all people who will eventually purchase your product or service will say "no" before they say "yes." People don't want to be sold, so the standard answer to "do you want to buy?" will generally be "no." If you don't approach selling with a positive "I can be successful" attitude, you will be eaten alive by the challenges associated with selling. Top sales professionals experience the same challenges as every other salesperson. The defining difference is found in their attitude and their belief that regardless of the challenging circumstances, they will be successful. They know that in sales there are only two things they can control: activity and attitude. If they work hard and maintain a positive attitude, they will find the success that eludes the average salesperson.

**Principle No. 8 — Rapport Building.** Those sales professionals who are top income earners know that people buy from people they believe, like and trust. They know that sales success is ultimately the result of strong, lasting relationships. The most successful salespeople know that a relationship built today will generate continuous sales, while a sale made without building a relationship will be lost in the storm of competition. Professionals cultivate the sales opportunity by building a solid foundation of friendship and trust that will withstand the constant buffeting of the winds of price.

**Principle No. 9 — Problem Solving.** The very best and most successful salespeople realize that selling is nothing more than finding a problem and then presenting their product or service as a solution to the problem. There are impulsive buyers, but the majority of all people who purchase are making that purchase to solve a problem or to meet a need. Without a need there is virtually no opportunity for a sale. Focus your attention on discovering what the buyer needs and then do everything within your power to help him achieve what he needs. To effectively solve problems you must ask probing questions and then listen effectively. After all, selling is the process of discovering needs and presenting solutions, not blindly telling someone that they should buy your product.

**Principle #10 — Caring:** The crowning principle embodied by all successful salespeople is caring more about meeting the needs of the customer than in making the sale. When you are willing to lose the sale in the process of helping the customer achieve their purpose, then you have reached that level of professionalism that will propel you to the success that other salespeople find only in their dreams. Your sales activities should be totally focused on providing the right solution for the customer, without any thought given to your own income. When you care that much, you will ultimately be rewarded tenfold. Selling is not about you; it is all about the customer.

Tim Huffaker is the president of The Business Performance Group, a sales training and coaching firm headquartered in Salt Lake City. The company teaches core sales principles and skills, allowing clients to double their sales. Huffaker is the author of hundreds of sales articles and can be contacted at (801) 557-4571 or tim@bpgutah.com.

from page 17

City. **Art Coley**, previously vice president of global development, has been promoted to senior vice president of global and business development. In his role, he will lead the company's franchise and business development strategy, leveraging work and revenue producing activities that will build strategic brand value for the network. **Suzette Blackmore**, strategic director of business development, will work closely with Coley. **Jesse Himsworth** has been promoted to director of marketing. Himsworth will direct the marketing team in developing marketing strategies for business centers and their customers, creating tools that drive qualified leads to business centers, as well as building and evolving the AlphaGraphics brand. **Tommy Auger** will serve as chief financial officer for the franchise. Auger will help streamline and update financial processes to increase efficiency.

## TECHNOLOGY/LIFE SCIENCES

• **Fibernet Corp.**, an ISP and provider of executive-class colocation services, Orem, has hired **Ike Ikeme** as vice president of sales. Ikeme will focus on driving the continued growth and exposure of the company's hosting and data center services. Ikeme previously managed all aspects of human resources at the Orem-based SuperTarget as an executive team leader.

## TRANSPORTATION

• **C.R. England**, a global transportation provider headquartered in Salt Lake City, has made additions to its corporate office. **Tony Volante** has been named operations manager. He has been with the company for four years, serving as a driver manager and as a load planner. **Jason Mathews** is a road service agent, and previously worked as a heavy duty towing operator. **Jessica Gallagher** is a log auditor, and is a recent graduate of the University of Utah.

## TRAVEL/TOURISM

• **Bob Wheaton**, president and general manager of Deer Valley Resort, and State Sen. **Dennis Stowell** were inducted into **Utah's Tourism Hall of Fame** during the Utah Tourism Conference in Park City. Wheaton has 35 years of ski industry expertise. He is a past member and president of the board of directors for the Park City Chamber and Visitor's Bureau, as well as president of the Intermountain Ski Areas Association board of directors. Stowell's public service spans 25 years, serving as mayor of Parowan Commissioner and State Senator in the Utah Legislature.

• The **Visit Salt Lake Connect Pass** has added **The Leonardo** in downtown Salt Lake City. Due to open in the summer, The Leonardo's mission is to inspire creativity and innovation in young people and adults with the multidisciplinary blend of science, technology and art. The Visit Salt Lake Connect Pass lets locals and visitors take advantage of the city's proximity to urban and mountain adventures.

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## Behavior modification

My wife and I have six children. Even though our children were raised in the same household by the same parents, all six children are totally different individuals. None of their personalities are even close to the same.

This makes parenting challenging. The temptation to try to use the same methods to discipline all our children is great, as then we as parents do not need to put in as much effort, time or patience into teaching our children. One-size-fits-all is definitely what appears to be an effective approach. However, we as parents have learned if we use the same methods to discipline our daughter, for example, by confining her to her room, as has worked with our other children, no behavioral modification would likely result. In fact, if anything, rebellion would occur. However, if we were to take her cell phone away for a month (which is, in fact, what we have done), we hope it will result in significant behavioral changes as well as a listening ear from our daughter the next time parental instruction is given. If we used the same tactic on our youngest son or any of our other children, the results would probably be different.

While I do not consider any of my clients to be one of my children, the human tendency to repeat past behaviors is quite similar. We, as investors, all know of times in the past when we or someone we know have “misbehaved” and sold our investments at their lows or bought them at their highs. Usually this is a result of panic when things look desperate or of euphoria when things look good. How many of us sold out of our investments at the March 2009 lows? How many of us bought real estate at highly inflated prices in 2006 and 2007? How many of us held onto our tech investments at the height of the tech bubble in 1999 and early 2000? Have we been “disciplined” through these types of excessive cycles?

The reason I am emphasizing discipline and behavior modification in this article is because of the value misperception many investors have of their financial advisors. Many investors try to shop around for an advisor (which is a good thing) with the intent of finding which advisor can manage for a maximum investment return in their portfolio (which usually is not the correct goal to have in mind).

I, as a financial advisor, do not know any better than you, as an investor, what the stock market is going to do tomorrow. Because of that lack of near-term forecasting ability, any expectation from my clients of me being able to outperform the next advisor by “timing” their investments is misplaced. So when a prospective client comes to me wanting me to offer them a “guarantee” that I will outperform their current advisor or perhaps their former advisor over the near-term, I show them the door.

The value that I propose to add to the advisor-client relationship is one of behavior modification, not portfolio performance. And if investor behavior is modified to a certain extent, *long-term* portfolio performance will likely be attractive. My value is in evidence when my client calls me, in a panic, during a market downturn, and says he/she cannot take the losses any longer and to sell them out. I will try to calm them down by minimizing the perceived signifi-

cance of the downturn. I will also remind them that even though the individual circumstances are different, the overall market conditions are very much the same as they have been in the past (i.e., high unemployment, inflation, geopolitical events, etc.).

So, as an advisor, my value proposition to you as an investor is not short-term portfolio performance. My value comes when I get you to modify your human desires enough to stay invested when times get tough. My value comes when I can get you to invest more when the world looks like it is coming to an end. My value comes with the design of an intelligently diversified investment portfolio that will not allow you to make a killing in good times but that will allow you to avoid being killed in bad times.

Just as my wife and I hope that our daughter's behavior will be modified by taking her cell phone away from her for what will likely seem to her to be an eternal period of time, I hope that your behavior is modified by a good investment advisor so that you are less prone

to make the mistakes that reduce investment performance. Just as we as parents are required to put effort into disciplining our children individually, so your financial advisor should be putting in effort to design an effective portfolio that works for your individual needs. Just as our daughter is counting on us as her parents to modify her behavior so that she does not put herself in harm's way, so you should count on your financial advisor to keep you in your investment portfolio when all around you seems to be in chaos.

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Jim Rigtrup



Jim Ackerman

## The power of smart copywriting?

Looking up an e-mail from an old friend, I came across this post he had forwarded to me from way back in '08. The post is from none other than the veritable Seth Godin. Consider it:

### The power of smart copywriting.

Consider this riff from a professionally printed freestanding sign in front of a Peet's in San Jose:

“Unlike Any Coffee You've Ever Tasted Before.”

Wait. Why the capitals?

“Unlike any coffee you've ever tasted before.”

“Before” is redundant.

“Unlike any coffee you've ever tasted.”

Too negative. And why is “unlike” a positive trait? I mean, boiled leech guts is also unlike any coffee I've ever tasted, that doesn't mean I want to drink it. How about:

“The best coffee you've ever tasted.”

Well, the thing is, the only coffee that matters is coffee I've tasted, right, so we could get shorter still:

“The best coffee.”

The problem with that is that it's nothing but bragging. Of course you think it's the best coffee. So what? You're lying. And even if you're not lying, how do you know it's the best? Compared to what?

This is where the smart copywriter becomes a marketer.

“Better than Starbucks.”

Well, it's still bragging. This is the moment where the marketer becomes a smart marketer and realizes that changing the offer or the product is more important than changing the hype.

“FREE TASTE TEST

Are we better than Starbucks?”

Invest \$20 in espresso in little cups, and maybe, just maybe, your sign will make some magic.

\*\*\*\*\*

Well, maybe. But with all due respect to Seth, I'm not buying into much of what he said here. OK, I'll give him the capitals. They're not necessary. I have no problem with the word “before,” however. It is redundant, true. That doesn't mean it should be eliminated. First of all, we talk like that. Removing “before” may be more grammatically correct, but it makes the statement just a little snooty. Less like “the rest of us.”

The argument for removing “unlike,” which he calls negative, is a common one. Many advertising pundits say you should avoid the negative. I disagree. People will spend more money and act more quickly to avoid a negative than to gain a positive. Having said that, the negative argument doesn't hold water here. In this case, “unlike” isn't a negative. It's saying different. Seth's case may have been better stated by suggesting the word “different” to replace “unlike.” But I don't even agree with that. “Unlike” is more different a word than different, and I believe therefore commands more attention, especially at the start of the headline. We like different. We like unlike. It appeals to our fundamental human need for variety.

Then Seth suggests we shorten to “the best coffee,” because “the only coffee that matters is coffee I've tasted ...” and there-

fore the words “you've ever tasted” are extraneous and can be eliminated for the sake of brevity.

Again, I disagree, not only for the reason he gives — that nobody will believe it because it's bragging — but also because the “you've ever tasted” gives the reader the very point of reference Godin later argues is missing from the phrase “the best coffee,” that makes the statement uncredible.

So Seth now asserts that smart marketing could change the headline to “Better than Starbucks,” if not for the fact that this is still unsubstantiated bragging.

And he finally gets to a pretty good headline which reads, “FREE TASTE TEST. Are we better than Starbucks?”

Now, before I go further, I should point out some market research. You see, it appears that Seth wants to make this headline shorter initially. But in the end it winds up longer. That's OK because the research indicates

— counter to what you would expect — that LONGER headlines SELL BETTER than short headlines.

I'm not suggesting you make your headlines longer for arbitrary reasons. I am suggesting that your headlines should be exactly as long as they need to be — not one word longer or one word shorter. The best headline I ever wrote, defined by the sales results it generated, was 40 words long. And it had a 30-word subhead. When I show people the ad, they almost universally claim it's too long. But we sold \$119,000-plus worth of merchandise with that ad, on about a \$7,000 ad investment, all in the course of less than two weeks. Not bad.

So, getting back to the coffee headline, Seth's and mine. I like “unlike any coffee you've ever tasted before ...” It challenges the reader to prove it by his or her own experience. But Seth's evolution is actually a good headline too, regardless of how he got to it. A firm offer is made and a question is asked. People like offers and the mind must answer a question.

So let me pose one ...

Which headline is better? Before you answer, a warning. How will your answer be any different than the mental gyrations Seth Godin and I have been through? In other words, how can you KNOW which headline is best?

There's only one correct answer. Test. Let the public vote, not with opinion, but with their wallets. Which one brings in more customers and generates more sales? Peet's should do up two signs and alternate them every other day for about two weeks. Then we'd know who's the smart copywriter, Seth or Jim. At least this time.

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# Don't mess up your marketing

By John Graham

While driving down Boston's Massachusetts Avenue one Saturday afternoon, it dawned on me that every bus stop shelter along this popular main artery sported advertising signage for Apple's iPad 2. Assuming that many bus riders were not target customers for a product selling between \$500 and nearly \$900, the two of us in the car thought that spending advertising dollars at bus stops seemed like a waste of money.

We were wrong. Just get on any type of public transportation and what do you see? Almost everyone is clearly a prospective iPad customer. Thumbs are going at incredible speed, while others are talking on their cell phones, playing games on a smartphone or watching movies on a handheld device. And with white earbuds everywhere, it was all about music. Rather than a marketing mistake, bus stops can be a perfect advertising venue for promoting the iPad.

Contrast all this with the huge number of businesses that don't have a clue about marketing. Feeling desperate to do something, they sign up after hearing the latest sales pitch offering a magical means for getting more customers. Rather than doing nothing, they write a check — and nothing hap-

## REDDICK

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and clean up.

- *Dining etiquette for removing something from your mouth.* Believe it or not, the easiest and also the most appropriate thing to do is to raise the utensil you are using to your lips and gently push the offending article onto the utensil. Then deposit it on the edge of your plate. The exception is when you have a large mouthful of gristle and fat. In this case, dining etiquette requires that you excuse yourself to the restroom and remove it. No one will want to look at that on the side of your plate, and it does not belong in your napkin.

- *Is it acceptable to sop up something with your bread?* Don't do this at a business lunch unless the host says this is acceptable or does it himself, in which case it's OK. Remember, don't hold the bread in your fingers and push it around in the sauce. Instead, break a piece of the bread off and then use your fork to spread some sauce on it and eat it

Your dining skills will be observed and evaluated as you carry on a professional conversation with an existing client or as you attempt to build a relationship with a new client. So yes, table

pens.

The truth is that the communications environment is so dynamic today there are no firm marketing answers. This makes it incredibly important to avoid wasting marketing dollars. Here are thoughts that may be useful:

1. **Don't get mauled in the discount trap.** One of the unintended consequences of the recent recession is a discounting mindset that continues to shape consumer behavior. The Groupon, as well as its imitators, thrives on consumer demand for discount deals and, as might be expected, there are apps for managing them.

One retailer, who had just signed up for a Groupon-type deal, was attending a meeting and constantly checking sales on an iPad. He was only interested in the number of sales rather than the impact they had on his bottom line, even though the net was rather small.

As a *Harvard Business Review* article pointed out, "... Merchants should be cautious and skeptical about these innovations. Even when sweetened with incentives for repeat purchasers, jazzed up with time- or item-specific discounts, or offered through location-aware mobile devices, all daily deals are simply price promotions .... A steep price promotion can make consumers permanently price sensitive by lowering

manners really do matter! They provide an opportunity for your client to see a polished, poised and sophisticated executive versus someone who is uncomfortable, awkward and ill at ease. Therefore, it should come as no surprise that dining, unless done well, could be disastrous to your reputation.

Remember, your behavior at the dining table is a good indicator of what your client can expect in an important meeting or merger. Taking the time and effort to hone your dining skills is an investment in your future success.

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the reference price they expect to pay, and price promotions can distract customers from products' benefits, causing irreversible damage to brands."

Making an intense effort to portray the value of a product or service can create value without cutting the price.

2. **Stay away from "ego-driven" marketing.** When he answered the phone, the owner of a service company was immediately fascinated with the idea of having a 30-second video commercial — not to mention being the "star." Too much to resist, it was a slam-dunk deal, if there ever was one, even though there was no plan for using it.

When something catches the CEO's fancy, that's it, whether or not it has a role to play in the company's marketing. This can be called "ego-driven marketing."

In the same way, questions about the purpose of the ad, the message or how it might be used are pushed aside and deliberately ignored.

Failing to have a marketing plan and to spend time thinking through how each component fits into the overall picture is a tragic and costly mistake. It results in wasting valuable marketing dollars.

3. **All marketing is individual.** The late U.S. House Speaker "Tip" O'Neil held that "all politics is local." Such advice applies to marketing.

For decades, much of marketing was done with a broad brush: advertise in major daily newspapers, network TV stations and national magazines, and then toss in billboards and direct mail to the mix just to be sure.

By 2000, such an approach was dead and technology threw in the last shovel of dirt. The ability to gather, analyze and use enor-

mous amounts of consumer data has pushed the bar to the point where all marketing is individual.

With companies empowering customers to manage their individual marketing protocols, it's all about the individual. And will become even more so. Today's customers aren't flooded with random marketing messages. The only messages Amazon.com customers receive are those that fit their profile.

4. **The longer a company has been in business, the more it needs marketing.** This runs contrary to the popular view that the longer a company is in business the less it needs marketing. The assumption is clear: they are well-known to their customer and their constituency believes in the brand. Based on that, spending money on marketing is both unnecessary and a waste.

Yet, Coca-Cola, a very old brand, has one of the largest marketing budgets. And what about Heinz ketchup, Levi's and a host of others?

It's a specious argument if there ever was one, since it's easy to forget that the longer a company is in business, the greater the need to replace existing customers. It's also easy to ignore the fact that new competitors come into the picture and many consumers are easily lured by "new and better."

Without marketing, companies can become "dated" in the minds of even loyal customers.

5. **Basing decisions on common sense is trouble.** In fact, common sense is both untrustworthy and dangerous. "We don't need to survey our customers," said the head of an organization, who takes pride in knowing his customers. "If I ask a handful, they'll tell me what we need to know?" When the issue of continuing attrition is raised, he explains it away with

such a "common sense" explanation as a downturn in the economy.

As so many marketing professionals know from bitter experience, it's difficult to challenge the marketing views of those who are successful in business with facts, since their success serves to "validate" their views. This is why a book by the principal research scientist at Yahoo!, Duncan J. Watts, Ph.D., is valuable in helping to set the record straight. The sub-title to *Everything is Obvious: Once You Know the Answer* says it clearly: "How Common Sense Fails Us."

Duncan contends, as Christopher F. Chabris writes in the *Wall Street Journal*, "Common sense is a shockingly unreliable guide to truth and yet we rely on it virtually to the exclusion of other methods of reasoning." He points out that relying on common sense puts us in the position of dismissing and rejecting out of hand the objective testing of our decisions — including marketing and sales initiatives. When that happens, it can't avoid wasting our marketing dollars.

Far too much of today's marketing is based on what was popular in the past or what worked even a few years ago. These five principles provide guidelines for developing programs that produce positive results instead of wasting money.

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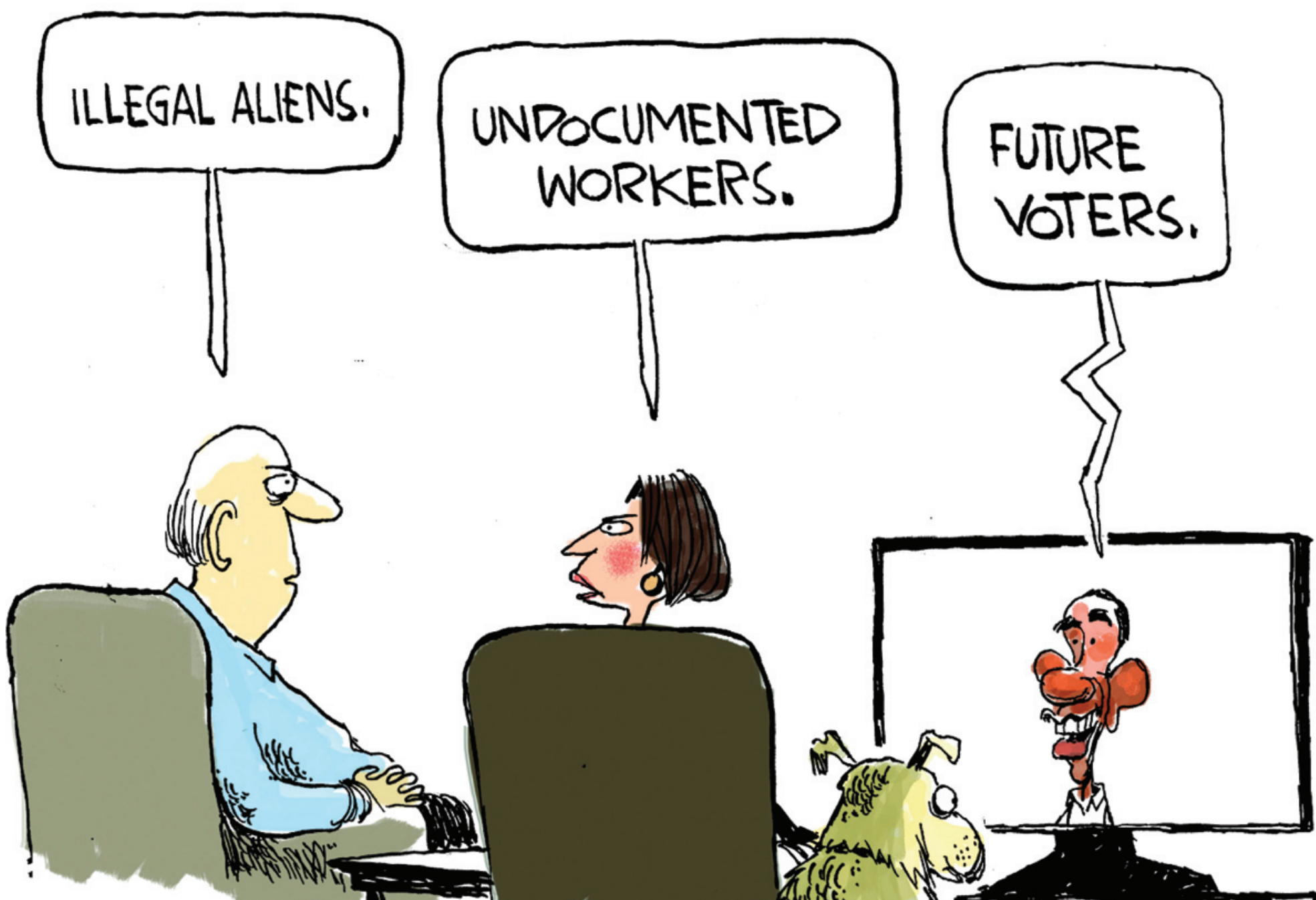
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## The Gingrich style

It is hard to see why anyone was surprised by Newt Gingrich's self-ignited implosion in the earliest hours of his presidential candidacy. The career of the former House speaker and Georgia congressman is practically bursting with proof that he suffers from chronic paranoid hysteria — a condition that has done more to advance than diminish his status among conservatives.

They loved him until he aimed his vitriol against one of their own, House Budget Chairman Paul Ryan, deriding the Wisconsin Republican's plan to gut Medicare as "right-wing social engineering."

Inundated by denunciations from every quarter of his party and movement, Gingrich swiftly backtracked and apologized and tried to blame the media. But his former fans are perhaps beginning to realize what most Americans

understood about him years ago — that he is wholly untrustworthy and unfit for leadership.

Addicted to excess in every facet of his life, Gingrich first became an important figure in the conservative movement almost two decades ago chiefly because — unlike the more decorous Republicans who then led his party — he was eager to utter the most vicious accusations against liberals and Democrats.

More than that, he encouraged other Republicans around the country to do likewise, founding an organization called GOPAC that trained right-wing candidates how to use a lexicon of slurs describing their liberal or Democratic opponents as "sick," "pathetic," "radical" and "traitors," among other things.

He echoed that list in his attack on the Ryan plan, too, which he described as "radical,"

giving great offense to his fellow Republicans.

Yet Gingrich's blustering, abusive rhetoric style has not only served him well, at least until now, but has also become the dominant tone among Republicans and conservatives. When he rants on about the "secular socialist Obama machine" as a threat comparable to Nazi Germany or Soviet communism, nobody on the right tells him to dial it back and almost everybody applauds.

Gingrich makes these wildly inappropriate comparisons habitually, without thinking about the harm they may cause. Last year, he saw an opportunity to exploit the controversy over the so-called Ground Zero mosque (which was neither located at Ground Zero nor simply a mosque). So he entered that debate warning that we are on a "precipice" and then quickly resorted to the most extreme language, calling the harmless people who wanted to build an interfaith

cultural center downtown (with the support of Mayor Bloomberg) as "radical Islamists" whose behavior was like "Nazis demonstrating next to the Holocaust Museum."

He didn't worry that his aggressive blather might actually serve the purposes of the real Islamist militants, whose chief strategy is to persuade the Muslim masses that America hates them and despises their faith. He saw a chance to promote himself at the expense of others, and he seized it, as usual.

That reckless opportunism is what we can expect from Gingrich as the presidential primary campaign unfolds, which is why most Democrats hope that he stays in and many Republicans wish he would dry up and blow away. With his darkly comical history as an advocate of family values (who has been divorced twice and married three times under the most dubious circumstances) and heartland frugality (who racked

up a huge debt at Tiffany's jewelry emporium in Manhattan), he has come to symbolize the least attractive aspects of his ideological brethren.

But as conservatives ostracize and isolate their former hero, they might also reflect on his unwholesome influence in their own development — and try to imagine how to banish not just this egregious politician but the Gingrich style, as well.

Joe Conason's articles have been published in *Harper's*, *The Nation*, *The New Republic*, *The Guardian* (London) and *The New Yorker*, among many other periodicals in the United States and abroad. He also appears frequently as a commentator on television and radio programs. A winner of the New York Press Club's Byline Award, he has covered every American presidential election since 1980.

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## Slaves to words

We could definitely use another Abraham Lincoln to emancipate us all from being slaves to words. In the midst of a historic financial crisis of unprecedented government spending, and a national debt that outstrips even the debt accumulated by the reckless government spending of previous administration, we are still enthralled by words and ignoring realities.

President Barack Obama's constant talk about "millionaires and billionaires" needing to pay higher taxes would be a bad joke, if the consequences were not so serious. Even if the income tax rate were raised to 100 percent on millionaires and billionaires, it would still not cover the trillions of dollars the government is spending.

More fundamentally, tax rates — whatever they are — are just words on paper. Only the hard cash that comes in can cover government spending. History has

shown repeatedly, under administrations of both political parties, that there is no automatic correlation between tax rates and tax revenues.

When the tax rate on the highest incomes was 73 percent in 1921, that brought in less tax revenue than after the tax rate was cut to 24 percent in 1925. Why? Because high tax rates that people don't actually pay do not bring in as much hard cash as lower tax rates that they do pay. That's not rocket science.

Then and now, people with the highest incomes have had the greatest flexibility as to where they will put their money. Buying tax-exempt bonds is just one of the many ways that "millionaires and billionaires" avoid paying hard cash to the government, no matter how high the tax rates go.

Most working people don't have the same options. Their taxes

have been taken out of their paychecks before they get them.

Even more so today than in the 1920s, billions of dollars can be sent overseas electronically, almost instantaneously, to be invested in other countries — creating jobs there, while millions of American are unemployed. That is a very high price to pay for class warfare rhetoric about taxing "millionaires and billionaires."

Make no mistake about it, that kind of rhetoric wins votes for political demagogues — and votes are their bottom line. But that is totally different from saying that it will bring in more tax revenue to the government.

Time and again, at both state and federal levels, in the country and in other countries, tax rates and tax revenue have moved in opposite directions many times. After Maryland raised its tax rates on people making a million dollars a year, there were fewer such people living in Maryland — and less tax revenue was collected

from them.

In 2009, many people specializing in high finance in Britain relocated to Switzerland after the British government announced plans to take 51 percent of high incomes in taxes.

Conversely, reductions in tax rates can lead to more tax revenue being collected. After the capital gains tax rate was cut in the United States in 1997, the government collected nearly twice as much revenue from capital gains taxes in the next four years as in the previous four years.

Similar things have happened in India and in Iceland.

There is no automatic correlation between the direction in which tax rates move and the direction in which tax revenues move. Nor is this a new discovery.

Back in the 1920s, Secretary of the Treasury Andrew Mellon pointed out that people with high incomes were simply not paying the high tax rates that existed on

paper, because they were putting their money into tax shelters.

After the tax rates were cut, as Mellon advocated, investments flowed back into the private economy, producing higher output, rising incomes, more tax revenue and more jobs. The annual unemployment rate in the next four years never exceeded 4.2 percent, and in one year was as low as 1.8 percent.

Despite political demagoguery about "tax cuts for the rich," in human terms the rich have less at stake than working people. Precisely because the rich have so many ways of avoiding taxes, a high tax rate is likely to do them far less harm than it does to the economy, on which millions of people depend for jobs.

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