

Road Map to the PMI Market

Benjamin
Moore 
PAINTS



Road Map to the PMI Market

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PREFACE AND STUDENT INSTRUCTIONS

This manual is not an ordinary textbook or technical manual. Instead of merely presenting information, it is designed to actively teach the material which it contains. The information is presented in a special way called “programmed instruction.” The book is called a program.

A program consists of a series of developmental questions following each page of text. Each text and set of questions present some information and require the learner to make one or more written responses.

The questions may take various forms and require different types of responses. The information which is presented may be in the form of a simple interrogative sentence, a group of declarative sentences or a group of multiple choice statements. The required response may be one or more blanks to be filled in, a selection to be made between alternate choices, or a brief essay answer.

The following examples illustrate the types:

1. State the opening sentence of Lincoln’s Gettysburg address.

Answer: Four score and seven years ago...

This type of question is self-explanatory. The length of the required essay response will depend on the subject content.

2. A stitch in time saves _____

Answer: nine

This type of question contains one or more blanks indicating that a response is to be filled in at that point. A single blank may call for a response of a single word or may require several words. The learner must make this decision. However, when two or more blanks are linked together in a series, this indicates that the required response has the same number of words as the number of blanks. For example: “_____” requires three words to be written in.

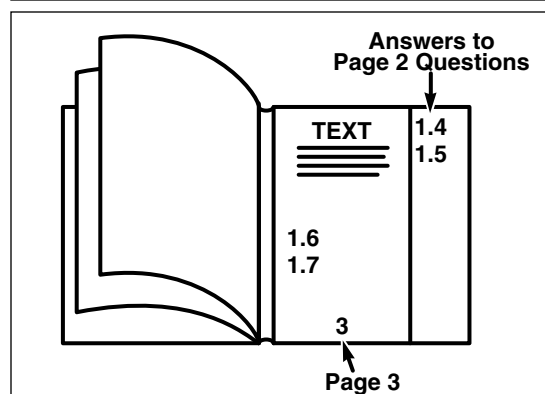
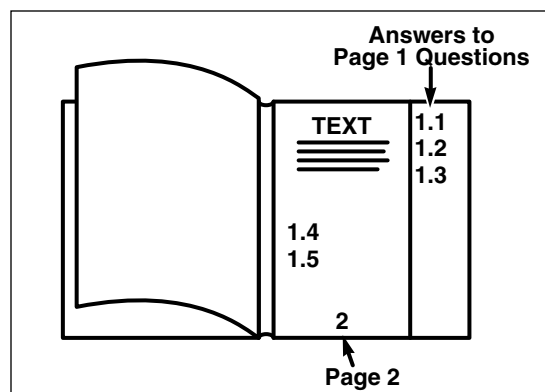
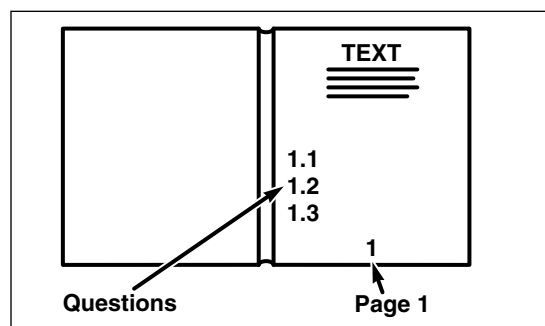
ORGANIZATION

The program is organized similar to a normal book, with some slight differences. Information presented in text at the top of the page appears first. Following the text is a series of developmental questions. The correct answers to each set of questions is located in the right-hand column of the following page.

NOTE: Some pages in this manual have no questions at the bottom. Where this occurs, no response is necessary and you should continue to the next page.

The drawings at right illustrate how to proceed through the manual:

- A. Read the text at the top of Page 1. Then answer the series of questions appearing below the text. **Write your answers on a separate answer sheet.**
- B. Turn to Page 2 for the correct answers to the Page 1 questions.
- C. Write your answers to the questions on page 2 on the separate answer sheet.
- D. Turn to Page 3 for the correct answers to the Page 2 questions.
- E. Write your answers to the questions on Page 3 on the separate answer sheet.
- F. Continue writing your answers to each page's set of questions on the separate answer sheet. Check each answer on the next page.



GENERAL INSTRUCTIONS

1. All answers are to be written on a **separate answer sheet**.
2. The program is designed so that the answers are hidden until after you have written in your responses. Turn the page and compare the correct answers to your responses *only after you have written them*. If you expose the answer box on the following page before you have written your responses to a question, you may not learn anything from that question.
3. For the program to be successful, it is important that you actually *write* all required responses. “Thinking” a response is not sufficient, and may actually damage the learning process.
4. Some pages provide review material. Since the same material may have been presented several times previously, it may seem pointless to answer these review questions. However, each is important, and *you should write your responses no matter how well you think you know the material*. This program method is to facilitate the learning process, and not intended to affront your intelligence.
5. You may occasionally make responses which convey essentially the same information, but use words other than the correct answer provided in the answer box. Such alternate answers are acceptable.
6. The program is designed so that you should not find any one question too difficult. As you proceed you will find that you become more and more proficient. However, if you happen to make some mistakes in your responses, they will not harm the learning process. *Remember that the program is designed to be a teaching instrument. It is not a test.*

DEDICATION

*This manual is dedicated to
everyone committed to the selling of
Benjamin Moore products.*

*Many thanks to all those people who,
over many years, have contributed to
the information presented herein.*

Corporation Sales & Marketing Department

FOREWORD

Benjamin Moore & Co. is an acknowledged leader in our industry. The company's success and recognition have been gained from what is perceived as a unique business strategy:

- **We sell only through the independent paint dealer**
- **We do not have company-owned stores**
- **We have a consistent business policy**
- **Our only business is the manufacture of coatings**

Specifically our policy states:

“To protect the Independent Paint Dealer by maintaining policies that afford opportunities for their profit and business growth in a highly competitive market.

To support the Independent Paint Dealer in their efforts to increase paint sales to consumers, painting contractors, and industry within their service area.

To maintain product quality, service, and price at levels competitively advantageous to the Independent Paint Dealer.

To respect the Independent Paint Dealers' rightful opportunity to operate without direct selling competition from their supplier.”

This policy raises Benjamin Moore & Co. above its competitors and places it in a very strong marketing position.

One of Benjamin Moore & Co.'s goals is the aggressive pursuit of the PMI market, working with and through our dealers. This PMI manual is a tool to help us achieve that goal. In order to have continued gallonage growth, it is imperative that we succeed in this market.

WHY THE PMI MARKET?

For several decades, our company has stressed the need to aggressively pursue the PMI (Painter, Maintenance, Institutional) market. The advent of the 90's has made it increasingly clear that the paint business is maturing, and increasing our gallonage must come at the expense of the competition by obtaining a larger share of the PMI market.

Our sales people recognize that their primary responsibility is to open new dealer accounts in open market areas. This is in part a result of our company policy, which states that there be no company ownership of retail outlets and no direct selling to the end user. Company policy directs us to intelligently operate our business within its confines. Additionally, company policy also directs us to pursue the PMI market on behalf of the Independent Paint Dealer. History has continuously shown that whenever additional gallonage was sought, the PMI market offered substantial opportunity.

Since obtaining increased market share can be extremely difficult and costly, we believe that the PMI market is the source of sustained, consistent growth, and the financial returns of this market substantially warrant its development. Benjamin Moore & Co.'s growth and profit objectives demand that we continually pursue the PMI market. **Consequently, we have established PMI sales development as a major job responsibility of our Sales Representatives.**

Recent federal government statistics indicate that over 500 million gallons of architectural coatings (paints, varnishes, lacquers, and stains) are purchased annually throughout the paint industry, and 40%, or over 200 million gallons, are purchased by painting contractors. Included in the contractor segment is the PMI market, a market sometimes overlooked by paint dealers and sales people alike.

Our view is that with a well-planned, integrated, and active PMI sales effort, we can capture a large share of the millions of gallons sold.

It is important to view the PMI market as a source of new accounts, which by definition is anyone who presently does not use Benjamin Moore products. Searching for new PMI business to place through your dealers is one of your primary responsibilities.

The PMI Market

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What Is It?

THE PMI MARKET... WHAT IS IT?

An important way you can help increase your dealers' business and our gallonage is to assist them in pursuing the PMI market. Understanding a market's size and make-up is crucial to developing a sales plan that has a reasonable chance of succeeding. Consequently, this section will examine the PMI market components. Its objective is to assist you in understanding the complexities of the market, and through this understanding, guide you in developing a thorough sales plan for your dealers.

Obviously, there are many highly visible targets such as painters and contractors, but they are only a portion of the potential users. Property management firms, schools, hospitals, institutions, and manufacturing plants are also volume paint users.

A Survey of the PMI Market

The PMI market accounts for 40% of total paint gallonage sold.

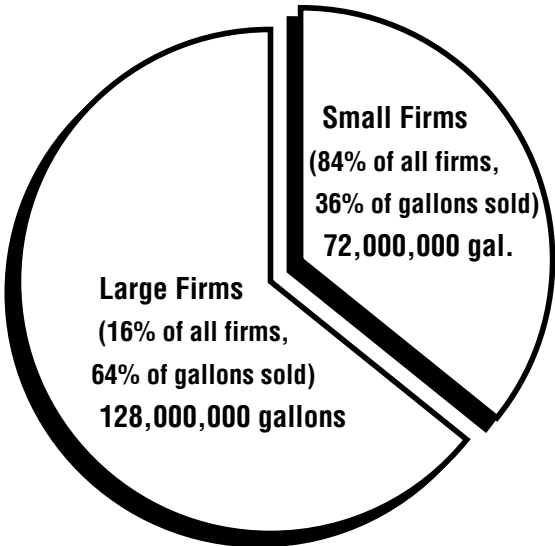
According to a recent business census, there are approximately 25,000 firms in the United States whose primary business is painting. Of these, 84% were determined as “small”, having sales of less than \$250,000 annually, and 16% being “large”, having sales over \$250,000 annually.

In addition, a telephone survey of 400 painting contractor firms nationwide was conducted in order to learn about their purchasing behavior, product preferences, and business practices. The following data are extracted from these two surveys.

Purchase Volume by Painting Contractors

Gallonage

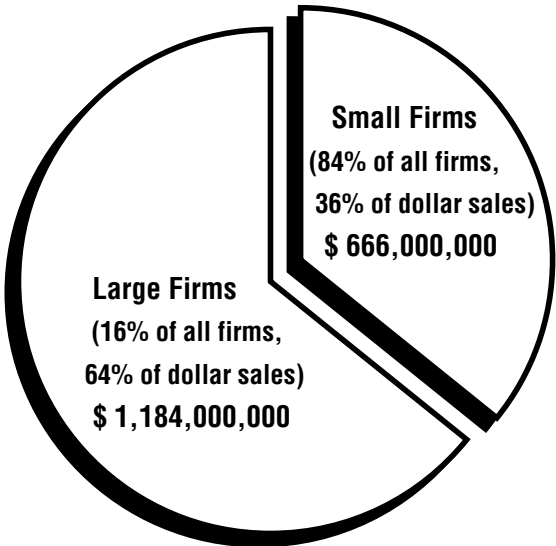
Total Annual Gallonage:
200,000,000



Average Annual Gallonage per firm:
Small Firms 1,400 gallons
Large Firms 13,390 gallons

Dollar Volume

Total Annual Purchases:
\$ 1,850,000,000



Average Annual Paint Purchases per firm:
Small Firms \$ 12,950
Large Firms \$ 123,857

Contractors’ Sources of Business

Of all firms surveyed, roughly half their business is derived from commercial accounts — apartments, schools, hotels, offices, stores, and hospitals.

The remainder of their business comes from two sources: industrial — factories, refineries, tanks, and bridges; and residential — single through 4-family housing. The split is roughly even for the smallest firms, but industrial accounts become progressively more important as the size of the painting contractor increases.

Who Specifies the Type or Brand of Paint to Buy?

Most commonly the job’s architect or engineer specifies the type of paint to be used. If not, the customer or the contractor is equally likely to do so.

Regardless of who does the specifying, a brand name is included in the specification about three quarters of the time. Over half of painting contractors prefer to buy a national brand of paint.

QUESTION

Remember to use a separate answer sheet to record your answers.

- 1.1 Name in descending order of importance the average painting contractor’s sources of business:
 - 1. _____
 - 2. _____
 - 3. _____

Relative Importance of Various Aspects of Service from Paint Supplier

In descending order of importance, those dealer-supplied services most important to, and mentioned by more than half of, the painting contractors, are:

- Tinting, mixing, and delivery of large batches
- Availability of colors
- Credit terms
- Discounts
- Delivery to job site
- Availability of product literature

QUESTION

1.2 Name in order of importance the aspects of dealer service which painting contractors value most:

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____
- 6. _____

ANSWER

1.1

The average painting contractor's sources of business are:

- 1. Commercial
- 2. Industrial
- 3. Residential

Paint Qualities Worth Paying Extra For

Paint performance was rated as “very important” by 90% of large contractors, and higher in importance than service or price.

In descending order of importance, those paint qualities most important to, and mentioned by more than half of, all painting contractors, are:

Interior Paint

- Appearance upon completion
- Hiding ability
- Ease & speed of application
- Touch up ability

Exterior Paint

- Appearance upon completion
- Long term durability
- Hiding ability
- Ease & speed of application
- Crack & blister resistance

QUESTION

1.3 Name in order of importance the aspects of paint performance which painting contractors value most:

	Exterior	Interior
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____

ANSWER

1.2

In descending order of importance, those dealer-supplied services most important to painting contractors are:

1. Tinting, mixing, and delivery of large batches
2. Availability of colors
3. Credit terms
4. Discounts
5. Delivery to job site
6. Availability of product literature

Warranties Offered by Painting Contractors to Their Customers

Over 80% of painting contractors provide warranties of some sort for either labor or materials or both. Almost all of these are for one year.

<u>Type of Customer</u>	<u>Labor</u>	<u>Materials</u>	<u>Both</u>
Commercial	86%	87%	71%
Industrial	87%	69%	55%

Summary

64% of the total gallons of paint sold is purchased by just 16% of the painting firms—those defined as “large” in the survey. Thus, the lesson to remember is to make sure that you call on all large painting contractors in your territory.

Although small firms purchase an average of only 1,400 gallons each per year, they can add significantly to your territory gallonage if you pursue them in an efficient, effective manner. Even the smallest of these is far larger than the average residential customer.

QUESTIONS

- 1.4** A major point from the study indicates that _____% of the paint is bought by just _____% of the painting firms.
- 1.5** It’s obvious that you must make calling on _____ a “number one” priority.

ANSWER

1.3

The aspects of paint performance which painting contractors value most are:

Exterior Paint

- 1.** Appearance upon completion
- 2.** Long term durability
- 3.** Hiding ability
- 4.** Ease & speed of application
- 5.** Crack & blister resistance

Interior Paint

- 1.** Appearance upon completion
- 2.** Hiding ability
- 3.** Ease & speed of application
- 4.** Touch up ability

THE PMI MARKET

The major components of this market are painters, industrial maintenance accounts, property management firms, and institutional painters. These and other types of firms included in this market are noted in the chart on the following page.

Locating these firms is as simple as referring to the telephone directory, Contractors Bluebook, Thomas Register, Black's Guide, construction newsletters, regular newspaper advertising and of course, your dealers.

It is easy to recognize the magnitude of the sales opportunity in the PMI market when one reviews the list of potential customers.

QUESTION

- 1.6** List at least 7 resources which identify PMI firms in your territory.
- 1. _____
 - 2. _____
 - 3. _____
 - 4. _____
 - 5. _____
 - 6. _____
 - 7. _____

ANSWERS

- 1.4**
A major point from the study indicates that 64% of the paint is bought by just 16% of the painting firms.
- 1.5**
It's obvious that you must make calling on painting contractors a "number one" priority.

The PMI Market

Airports and Transportation Agencies & Terminals
Apartments and Condominiums
Asbestos Removal and Replacement
Athletic Courts/Indoor
Building Alterations
Building Contractors
Building Restoration and Preservation Contractors
and/or Societies
Religious Institutions
Construction Companies
Department Stores
Drywall Contractors
Fire and Water Damage Restoration
Floor Treatments, Coatings and Preservatives
Food and Restaurant Establishments
Government Agencies (Federal, State and Local)
Hospitals and Health Care Centers
Hotels and Motels
Hotel & Motel Management Firms
Industrial Plants and Developments
Manufacturing Plants
Metal Cleaning and Maintenance
Office Buildings
Painting Contractors
Paperhangers
Parking Area Maintenance and Marking Contractors
Plastering Contractors
Public and Private Schools
Real Estate Developers
Real Estate Management Firms
Recreational Parks and Facilities
Shopping Centers
Steel Plate Fabricators
Structural Steel Fabricators
Stucco and Exterior Masonry Contractors
Tennis Court Contractors
Waterproofing Contractors

ANSWER

1.6

Seven resources which identify PMI firms in your territory.:

1. Telephone directory
2. Contractor Bluebook
3. Thomas Register
4. Black's Guide
5. Construction newsletters
6. Newspaper advertising
7. Dealers

PMI SUB-GROUPS

Generally speaking, there are five major sub-groups within the PMI market. They include:

- Large union painting contractors
- Large non-union painting contractors
- Small painting contractors
- Industrial and institutional maintenance painters
- Property management firms

In addition to these five major sub-groups, there are many other types of users that can bring valuable business to our company. But first, let's look at the major ones.

QUESTION

1.7 List the five major sub-groups within the PMI Market.

1. _____
2. _____
3. _____
4. _____
5. _____

Large Painting Contractors (Union)

These contractors have their own offices, as well as their own estimating and field personnel. They primarily paint large new construction, renovation projects, and industrial maintenance work. Nearly all of their work is done according to written specifications. They employ a very large number of painters, and are highly visible. You'll find they purchase from most major paint companies as well as many regional suppliers. You must expect to make many calls to find out who the key people are within the firm. You will spend an equal amount of time making calls on the estimators and the field or job supervisors.

Some very large commercial firms have in-house architects and designers who write paint specifications.

You must find out the current jobs being done by these firms and call on their painters at the job site. This will help create a "need from within" their own company to use Benjamin Moore coatings.

QUESTION

1.8 In your own words, what calling strategy should you use on large, union painting contractors?

ANSWER

1.7

The five major sub-groups within the PMI Market are:

1. Large union painting contractors
2. Large non-union painting contractors
3. Small painting contractors
4. Industrial and institutional maintenance painters
5. Property management firms

Large Painting Contractors (Non-Union)

Due to a smaller chain of command, expect to sell the owner or someone of authority just below the owner.

Most of these contractors use a separate office and shop outside of their home to conduct their business.

Contact is best made either in early morning, on the job site, or by calling and making an appointment.

It is likely that you'll find that fewer suppliers are used in the non-union painting firms because they are involved in less specification work. Usually one or two paint suppliers share a large portion of their purchases.

Befriend office and secretarial personnel, for they can be a great source of inside information regarding present jobs and future projects.

QUESTION

1.9 Why might you find fewer suppliers to a large non-union painting firm than in a large union painting firm?

ANSWER

1.8

You will have to speak to many people at large, union painting contractors. Among the people you must see are estimators, field or job supervisors, and the painters themselves.

Expect to spend a number of calls just finding out who the key people are.

Small Painting Contractors

Small painting contractors frequently work directly out of their homes. Usually they are very loyal to current suppliers and purchase from local paint stores. They perform work on new housing construction, repaint projects or residential homes. They also call directly on the home owner, and they are likely to use the product that the owner specifies. The best time to contact these people is very early in the morning (job site, if possible) or in the evening at their home. Many of these contractors depend upon referrals, and therefore use quality products.

QUESTION

1.10 Why are small painting contractors more likely to use quality paint?

ANSWER

1.9

Fewer suppliers are used by non-union painting firms because the contractors are involved in less specification work; they may therefore direct more business toward their favorite suppliers.

Industrial and Institutional Maintenance Painters

The fourth group within the PMI market is industrial maintenance and institutional maintenance painters. These painters are structured as follows:

“In-house” painters answer directly to the paint shop foreman or supervisor.

The paint shop supervisor or chief engineer usually has substantial control over what brand of paint is used for the company or institution.

In most cases, the final purchasing *source* (*i.e.*, the dealer, not the brand) is decided by the purchasing agent. Focus initially, however, on the paint shop foreman and try to create “need from within” to use Benjamin Moore products.

Be prepared to make a number of calls before seeing results as many of these types of end-users do not change preferences rapidly.

QUESTION

1.11 The selling strategy when dealing with industrial and institutional maintenance painters is to:

ANSWER

1.10

Small painting contractors are more likely to use quality paint because they depend upon referrals for business.

Property Management Firms

The fifth category of PMI painters is property management firms.

These accounts are very often low-profile users of large quantities of paint.

They will vary in structure; they may be either very informal offices that will allow you to call on the owner directly, or large development/management companies with an equally large chain of command.

It is important to find out initially whether the firm purchases paint directly for the properties they control or if they subcontract the work to painters. If they do purchase paints, then pursue their business in the normal manner.

If they subcontract, you should ask for the painter's name and phone number. Let the subcontractor know that you received their name and number from the prime contractor. Use this as an implied endorsement of Benjamin Moore products. These accounts often welcome your expertise about paints and stains.

ANSWER

1.11

The selling strategy when dealing with industrial and institutional maintenance painters is to focus on the paint shop foreman initially and try to create "need from within" to use Benjamin Moore products.

NO RESPONSE REQUIRED.
PROCEED TO NEXT TABBED SECTION.

The PMI Market

GOAL SETTING
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GOAL SETTING

REALISTIC, ATTAINABLE, AND MEASURABLE GOALS: THE KEY TO SUCCESS

The key to your successful effort in developing PMI business is setting realistic, attainable, and measurable goals. Many books have been written on the subject, and we certainly cannot cover goal setting in depth. However, on the next several pages, we will review what we believe to be the important points to succeeding in the PMI market.

Comprehensive planning is essential to the success of your PMI program. The responsibilities of a Sales Representative are extensive and varied, ranging from prospecting for new accounts and selling PMI business to developing advertising campaigns. Time is your most valuable resource. Without proper planning, it will be difficult to budget time for PMI sales activities.

You will be required to set a number of goals as part of a comprehensive effort to develop PMI business in your territory. Each goal should reflect your perception of the “real world.” Do not be unrealistically over-aggressive. Establish your goals so they challenge you and your dealer while permitting a reasonable degree of success.

The success experienced as each goal is attained builds your dealer’s confidence in you and your abilities. Your dealer’s confidence in you then becomes the basis for establishing and meeting more challenging goals.

ESTABLISHING GOALS THE FIRST STEP IN ORGANIZING YOUR PMI EFFORT

A goal is the objective towards which a defined effort is directed. Goals for your territory should be established during your annual review with your District Sales Manager. Goals provide the orientation for building your PMI sales plan. PMI sales goals should be established in the following areas:

1. Territory Goals

Establish PMI gallonage sales goals for the territory based on its potential. These estimates may be based on market surveys, trade association numbers, government statistics, etc.

2. Product Goals

Set goals for specific Benjamin Moore products as a means of measuring progress.

QUESTION

2.12 When and with whom should you establish your territory PMI goals?

Goal Setting: Establishing Goals

3. Dealer Goals

Develop goals for each dealer, relative to their individual needs and potential. Involve the dealer in establishing these goals. According to an American Paint Journal Survey, most dealers contacted agreed that a realistic PMI goal is 10–15% of sales. Some indicated a goal of up to 40% of sales.

4. Market Goals

Set goals for key segments of the PMI market. For example, a goal might be to effectively solicit every hospital and university in a given market, or to conduct a comprehensive Market Blitz.

QUESTION

2.13 You should establish four sets of goals. Identify them:

1. _____
2. _____
3. _____
4. _____

ANSWER

2.12

Goals should be established during your annual review with your District Sales Manager.

BUDGETING OF TIME

If you wait until there is time for PMI selling, few calls will be made. **You must budget your time for PMI calls.** Only then will you achieve your goals. Since territories vary, determine with your District Sales Manager the appropriate amount of time you should devote to pursuing PMI Business.

As noted previously, Benjamin Moore & Co. regards PMI selling as a primary responsibility of the Sales Representative. Difficult choices will have to be made. Dealers must be convinced that your efforts on their behalf are better spent seeking new PMI business than performing routine tasks which their own store personnel could do.

QUESTION

2.14 How much of your time should be budgeted for PMI calls?

ANSWER

2.13

You should establish 4 sets of goals:

1. Territory Goals
2. Product Goals
3. Dealer Goals
4. Market Goals

Make efficient use of your time

1. Plan in advance with each dealer to make calls together. If this is not possible, plan briefing sessions prior to making calls alone, or perhaps utilize their personnel for making follow-up calls.
2. Make specific appointments when possible. Frequently, many companies and government agencies have certain times when they will see salespersons.
3. Spend your time where it is most productive—developing the PMI business. Make better use of any time presently spent making “unnecessary” call-backs or “convenience calls” on behalf of your dealers. Avoid “milk runs.”
4. Think of PMI accounts as customers. They are! Approach them as you would a new account prospect and give them equal attention. Remember that many hospitals purchase more paint than the average dealer. In the process of selling to the maintenance market, you will be exposed to new and interesting areas of the business community, such as museums, landmarks, and other institutions of cultural and historical significance. As you become acquainted with the PMI marketplace, you will find ample opportunities to broaden your knowledge and to explore interesting areas outside your usual selling experience.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

ANSWER

2.14

Determine with your District Sales Manager the appropriate amount of time for making PMI calls.

SELECTING AREAS OF CONCENTRATION

Quality, not quantity, is the name of the game. A “shotgun” approach is usually doomed. It is better to target a few selected prospects than to make many ineffective calls.

Develop an original approach to ensure effective calls.

The object is to make sales, not merely calls.

Of course, if you do not make calls, no sale will result.

Survey the market before you begin. Every market—urban, suburban, or rural—has PMI prospects. Know where the paint is sold in the selected market and who your competition is.

Focus on specific areas such as painting contractors, power plants, factories, hospitals, institutions, schools, hotels, motels, and apartment complexes.

QUESTION

2.15 Specific areas in the PMI market you might concentrate on include:

1. _____
2. _____
3. _____
4. _____
5. _____

Goal Setting: Selecting Areas of Concentration

ANSWER

2.15

Specific areas in the PMI market you might concentrate on include:

1. Power plants
2. Factories
3. Painting contractors
4. Schools, institutions and hospitals
5. Hotels, motels, and apartment complexes

PROCEED TO NEXT TABBED SECTION.

SELLING TO THE PMI MARKET

Very few people have learned to sell from a book. It takes experience and a willingness to win to ultimately succeed. However, the skills of selling are based upon a certain “body of knowledge.” It is from this knowledge base that we have selected several important selling principles and ideas, which collectively will help you succeed in the PMI Market. Thus, this section will examine those PMI selling principles and selling skills which are a necessary part of the PMI sales experience. The key to becoming successful is to translate this knowledge into behavior. Knowing this in advance will help you recognize a recurring need throughout all areas which comprise the PMI market — creative problem solving. Ask your District Sales Manager to work with you and assist you in developing these skills.

GROUND RULES

There are some important ground rules for pursuing PMI business. They are:

1. When dealers request you to make a PMI call on their behalf, make the call as quickly as possible.
2. If it is discovered that another Benjamin Moore dealer is servicing the account with Benjamin Moore products, then leave up-to-date color cards and new product information.
3. However, if Benjamin Moore products are not being sold by the dealer presently servicing the account, the Sales Representative for that account should be advised. If that Sales Representative is unable to convert the PMI account to Benjamin Moore products in a reasonable time frame, then the responsibility to do so is yours, with your District Sales Manager's approval. This is especially true in metropolitan markets.

QUESTION

- 3.1** What is the first action you should take if you discover another Benjamin Moore Sales Representative is servicing an account you are calling on?

AREAS OF KNOWLEDGE

As we indicated earlier in the manual, approaching the PMI market requires detailed planning, but even a sound plan will be ineffective if you lack adequate knowledge in several important areas. As a Benjamin Moore Sales Representative you have many fine policies, products, and programs. You must be well versed in these subjects. You must also continue to develop your sales skills and knowledge in these important areas:

1. Company Policy

Benjamin Moore & Co. is committed to the independent paint dealer. The PMI prospect should understand that our quality products are sold only through authorized Benjamin Moore dealers.

2. Product Knowledge

Use your time to learn as much as you can about maintenance problems and coatings.

Learn the technical aspects of paint, substrates, brushes, application techniques, and preparation techniques.

It is your responsibility to study the manuals, brochures, technical data sheets, labels, and other descriptive literature which we provide. The easiest product to sell is a product you know from personal experience. Brush out our products at every available opportunity. Additional sources of product knowledge include fellow Bill Jonesers, spray company seminars, in-store demonstrations, dealer personnel, dealer training schools, and PDCA meetings. Benjamin Moore & Co. also conducts Corporate Product Training Seminars that supply important product information.

Develop a total mastery of the facts, figures and procedures related to the PMI market needs. Be prepared to meet virtually every eventuality.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

ANSWER

3.1

If you discover another Benjamin Moore Sales Representative is servicing an account you are calling on:

Leave up-to-date color cards and new product information.

Selling to the PMI Market: Areas of Knowledge

3. Pricing

The dealer must be consulted before quoting prices.

It is essential to know competitive pricing, particularly when you are competing against “direct sellers.”

4. Company Programs

A thorough knowledge of Benjamin Moore’s pricing, dating programs, and all available discounts, including volume discounts, is extremely important. You should be able to convince your dealer of the value of setting prices based on a true net cost at all times. Taking an extra 5¢ or 10¢ per gallon off the price may be the difference between receiving or losing an order from a PMI prospect.

The following discounts should be considered:

- Seasonal datings
- Contractor dating
- New product dating
- Bucket allowances
- Cash discounts
- Volume discounts

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

Selling to the PMI Market: Areas of Knowledge

5. Competition

Know your competition's products, policies, distribution points, store locations, customers, and strengths and weaknesses.

Know when your dealer is presently selling competitive products to a PMI prospect. In this case, speak with the dealer in an attempt to correct the situation. Make sure your dealer understands that you intend to cultivate the PMI prospect to the Benjamin Moore product line. Ask for the dealer's commitment to Benjamin Moore products. In every case, good judgment, fair play, and just plain old "common sense" must prevail.

QUESTION

3.2 List five areas of knowledge noted thus far that you should have when selling to the PMI market.

1. _____
2. _____
3. _____
4. _____
5. _____

Selling to the PMI Market: Areas of Knowledge

6. Market

Study the market to determine its needs and who dominates it. Determine whether or not Benjamin Moore & Co. can serve the need. Previously, we indicated where you can find various PMI prospects. In addition to that list, you can also check the Chamber of Commerce, various hospital and industry lists, builders associations, the Dodge Reports, community building licenses and permits, engineer associations, and the PDCA.

Your dealers should commit to the PMI market by pledging the following actions:

- selling Benjamin Moore products.
- following up on a regular basis all PMI contacts that have been made.
- carrying sufficient inventory to meet the need.
- pricing the inventory competitively to move it.
- offering the contractor dating program or any other available programs.
- providing the service required by the PMI accounts.

QUESTION

3.3 Four items of key information you should learn about your local PMI markets are:

1. _____
2. _____
3. _____
4. _____

ANSWER

3.2

Five areas of knowledge that you should have when selling to the PMI market:

1. company policy
2. product knowledge
3. pricing
4. company programs
5. competition

Selling to the PMI Market: Areas of Knowledge

7. Prospects

Know your PMI prospects. What products are they presently using? Is there a specific need which you can meet? Solving a problem is always an excellent entrée.

8. Purpose

Know why you are making the call. Have a specific goal and purpose. If the prospect will not buy today, ensure a future meeting. Be persistent. Eventually you will sell the prospect.

9. Opening Doors

Develop the ability to determine who is the key individual. Is it the purchasing agent, engineer, paint foreman, or the painter? Always make it a point to meet the painter or the end user. If the person applying the paint likes you or your products, your foot is “in the door.” Having made a successful contact, the opportunity is yours to keep the door open. Always make a follow up call. This is salesmanship.

Exhibit 1 on the following page, entitled “Programs and Tools,” indicates several Benjamin Moore programs which are available to help you solicit PMI sales.

ANSWER

3.3

Four items of key information you should learn about your local PMI markets are:

1. market needs
2. competition
3. applicable Benjamin Moore products
4. location of key accounts and prospects

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

EXHIBIT 1

PROGRAMS AND TOOLS AVAILABLE TO SOLICIT PMI SALES

Programs

Contractor Dating Program
Bucket Allowances
New Product Datings
Seasonal Datings
Painter Meetings
Blitzes

Tools

Moore's Computer Color
Matching System
Color Card Manuals
IronClad Materials
Specifications Manual
Glossary of Paint Terms
Color Wheel
IronClad Booth
Industrial Maintenance
Manual
Mailing Pieces
Moore's Video Color Planner
Technical Data Sheets
Sheen Level Charts
Moorcraft Satin-Fil Brochure
Moorcraft Professional
Coatings Manual
Moorwood Manual
Product Samples
Moorlastic Elastomeric
Waterproof Coating Brochure
Moor-O-Matic Color
Materials
Chain Specifications

Services

Architectural Department
Color Planning Department
Technical Assistance
"Ship To" Policy

Dealer Participation

Dealers should be informed of what the PMI program is and how it works. A dealer must understand that there is a difference between service and sales. Your picking up a quart of paint for the dealer in lieu of making a PMI call is unproductive use of your time. To approach the PMI business, whenever possible, the dealer should supply you with the pertinent information as to whom to contact and what products might be needed.

Although innumerable special purpose coatings are available, a recent *Decorating Retailer* survey shows that an inventory of as few as ten of the major PMI products can satisfy 80% of the PMI customers' needs.

QUESTION

- 3.4 As few as _____ major PMI products can serve _____% of PMI customer needs.

Selling to the PMI Market: Dealer Participation

It is important to your success that dealers understand that in order to achieve their PMI sales goals, they must stress the following:

1. **Local service.** Large orders can be shipped from our factory, but the dealer must carry a stock for same-day delivery when the customer needs it.
2. **Product knowledge.** The dealer can always rely on us to answer unusual technical problems. However the dealer must be knowledgeable in our products.
3. The dealer must sell **quality and service first**, not just price.
4. The dealer should also be **adequately stocked** with such sundry items as brushes, cleaners, caulking, etc.

Dealers should advertise to the PMI trade. In certain instances, they may want to hire outside Sales Representatives to further develop the PMI market. The dealer may also want to hold such activities as painter breakfasts, spray seminars, painting seminars and other PMI training activities.

Dealers should be willing to include as part of their sales efforts the use of such PMI sales aids as our Industrial Maintenance Manuals, Moor-O-Matic painter fan decks, how-to folders, Moorcraft Professional Coatings Manual, Technical Data Sheets, Specifications Manual, chain specifications, color wheels, and color card manuals.

QUESTION

3.5 What must a dealer stress in order to achieve sales in the PMI market?

1. _____
2. _____
3. _____
4. _____

ANSWER

3.4

As few as **ten** of the major PMI products can satisfy **80%** of the PMI customer's needs.

Planning and Preparation

As part of the planning and preparation, you and the dealer should identify your prospects by type of account, location, size, and sales potential. Then, for each account, create an account card or an account file which lists such important information as:

- Account type
- Company name of account
- Name of contact person
- Address
- Phone number
- Sales potential
- Products being used
- Servicing dealer

After creating your customer file database, plot out each account on your territory map. This will immediately identify your PMI sales call routing options. It is important to have the account card or file with you on each call. Be certain that the call objective is clear for each account.

QUESTION

3.6 Identify a significant way, noted above, that can help your dealer increase his PMI business.

1. _____

2. _____

ANSWER

3.5

1. **Local service.**
The dealer must carry a stock for same-day delivery when the customer needs it.
2. **Product knowledge.** The dealer must be knowledgeable in our products.
3. The dealer must sell **quality and service**, not just price.
4. The dealer should be **adequately stocked** with such sundry items as brushes, cleaners, caulking, etc.

Selling to the PMI Market: Planning and Preparation

Concentrate your call efforts within a small geographical area during the first penetration of the PMI market. Call on high potential target areas where repeat calls can easily be made. If possible, obtain advance appointments. Remember that repeated calling is the key to successfully obtaining PMI sales. A sample *painter call record* is shown on page 36.

Look beyond the “high-visibility” accounts when pursuing PMI business. Calls on the “unknowns” may locate a high volume, profitable account that can be as gratifying as the “high visibility” people.

When making these calls, you should always have a “special” product sample with you. Be prepared to talk about a specific product, and make a brush out if possible. The dealer should have a prepared price list for the products offered. Unless your dealer agrees to provide you with his pricing, defer pricing to the dealer, and sell all other benefits for buying Benjamin Moore products.

ANSWER

3.6

The following will help your dealer to increase his PMI business:

1. Identifying potential customers by location, size, and sales potential.
2. Organizing a call file.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

Selling to the PMI Market: Planning and Preparation

Create a call report system (see following page for a suggested sample form for recording an individual call.) Each call report should become a part of the prospect's permanent record in your account file system.

Record all of your calls using your call report system.

It is important to keep good records of your PMI calls, because good records allow for well-planned and organized follow up calls, and it is the follow-up calls which sell products.

Secondly, if you leave your present territory, your records will allow for an orderly transition to your successor.

When planning your PMI calls, **reserve time to do this**, so that you are not distracted by the normal demands of the day.

An absolute must on any PMI call is to **find and deal with the decision maker**; that is, the person with the authority to specify, authorize the purchase, or buy.

QUESTION

3.7 Why is it important to keep good PMI records?

SAMPLE PAINTER CALL RECORD

Firm Name: _____ Type of Business: _____

Shop Address: _____ Shop Phone: (____) _____

_____ ZIP Code

Contact Person(s): _____

Home Address: _____ Home Phone: (____) _____

_____ ZIP Code

To be filled out after telephone call

Date telephone call made: ____/____/____ Time: _____ Call Made by: _____

Topics/Products discussed: _____

Appointment made: _____ Date contractor agreed to be called on: ____/____/____ Time: _____

For Telephone follow-up For personal visit

Location: _____

Preparation necessary before making call: _____

To be filled out after on-site call

Date of Call: ____/____/____ Location: _____ Call Made by: _____

Information Obtained:

Follow-up: Due Date: ____/____/____

Topics Discussed:

Recommendations Made:

Selling to the PMI Market: Planning and Preparation

Part of preparing for PMI calls is developing one's self. Take a long, hard look at your skills and priorities. Know what they are, and list them.

Examine your attitude. Proper attitude is essential to success.

Also assess your ability to communicate and to listen. Do you have a strong rapport with each dealer? Purchasing agent? Try to develop a strong rapport with these people. Listening is part of communicating, and you can learn much by being a good listener.

During this evaluation step, also review your dealers and compare their gallonage purchases for the last three or four years. Determine the sales patterns developed and the reasons for the patterns.

Next, determine how to improve your dealers' gallonage. Decide which dealer would be the most cooperative and interested in pursuing PMI business. Keep in mind the ability of the dealer to service the PMI customer. Remember, you are offering the dealer an opportunity for not only added paint sales, but also increased sundry sales.

QUESTION

3.8 What is the key to establishing a rapport with a dealer or prospective account?

ANSWER

3.7

Good records allow for well-planned follow-up calls.

Also, they provide for an orderly transition.

CALLING ON THE PROSPECT

Sales Representatives frequently resist making PMI calls because these are usually “cold calls”; it can be uncomfortable calling on a stranger who often wants nothing to do with you. Cold calls are also time consuming and rarely result in a sale on the first call. Calling on PMI prospects, however, is the basis for developing PMI sales.

As far as the PMI prospect is concerned, a comfortable and satisfactory relationship with the present paint supplier may exist. The prospect has no reason for changing; in fact, resists change. The first tendency then is to quickly dismiss you. It’s nothing personal; the individual simply doesn’t want to change long held habits. Thus, rejection is to be expected.

Many buyers could not give you a good reason why they remain with their current paint supplier. They are often simply gripped by the inertia of habit. How can you overcome this attitude? Find a new approach, serve their interests, be persistent, and don’t fear rejection; it is normal, not personal. Think of rejection as a normal, first step in the process of making the sale.

QUESTION

3.9 Why do most Sales Representatives resist a “cold call”?

3.10 Why is it important not to be discouraged during the rejections associated with “cold calls”?

ANSWER

3.8

The key to establishing a rapport with a dealer or prospective account is listening.

**Try A New Approach:
Customize Your Call.**

We are all creatures of habit, and Sales Representatives are no exception. A Sales Representative is less effective if their presentation is routine. This is easily avoided by customizing your approach for each call.

You can vary your presentation by contributing new ideas or products that may help the account solve a problem. Experiment with different approaches.

Understanding the needs of each account will permit you to customize your presentation to meet those needs.

Use such personal traits as self-respect, honesty, fairness, courtesy, sense of humor and thoughtfulness as part of your presentation. Do not be repetitive in your presentation. Emphasize key points without “beating a dead horse.”

QUESTION

3.11 In your own words, summarize the key points noted above.

ANSWER

3.9

Most Sales Representatives resist making “cold calls” because the calls are time-consuming and they feel uncomfortable dealing with potentially unfriendly strangers.

3.10

Most new accounts resist a “cold call” because people normally resist change. The account may also have a satisfactory relationship with their current supplier.

Serve Your PMI Prospects' Interests

The surest way to obtain a sale is to match product features and benefits to the prospects' needs.

The way to learn the prospects' needs is to ask, and then listen without interrupting.

Use both open-ended and direct questions:

An **open ended question** is one which requires an explanation and not just a yes or no for the answer. An example is: "Why do you believe that coverage is more important than durability?"

A **direct question** is one which can be answered with a yes or no or a specific fact. For example, a direct question might ask: "How many gallons do you purchase per month?"

QUESTION

3.12

Define an open-ended question:

Define a direct question

ANSWER

3.11

Do not allow yourself to fall into a routine—this makes for boring and ineffective presentations.

Try to add something new to your presentation that may help the account solve a problem.

Customize your presentation to the account.

Use your personality when selling.

Serve Your PMI Prospects' Interests (continued)

Finally, use the age-old formula for questioning:
Ask Who? What? Where? When? How?

After you ask the question, be quiet. Give the customer time to formulate his answer. Listen intently. Concentrate to hear the answer to your question. Finally, watch for signals from their "body language."

Doing this suggests to the customer that you are truly interested in their concerns—which you should be! This, over time, will help the customer "warm" to you and your products.

ANSWER

3.12

An open ended question is one which requires an explanation.

A direct question is one which can be answered with a yes or no or a specific fact.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

Be Persistent

A recent survey indicates that:

- 80% of all new sales are made after the fifth call on the same prospect.
- 48% of all Sales Representatives make one call and cross the prospect off their call list.
- 25% quit after the second call.
- 12% call three times and then quit.
- 10% keep calling.

Thus, on the national average,

10% of the Sales Representatives
make **80%** of the new sales.

QUESTION

3.13 80% of all new sales are made after how many calls?

Don't Fear Rejection

Occasionally, Sales Representatives fear cold calls because of rejection. Fighting this fear is a full time job. It is natural, and when managed properly, may be helpful. It may help because when the "internal juices" get flowing, your presentation can be exciting.

Tips for controlling fear include:

- Think of making the sale, not being rejected.
- Stay relaxed.
- Be prepared. Anticipate objections. Good preparation helps you feel in control. It builds confidence.
- View the prospect from a long-term perspective; they may end up as a very good customer.
- Work more productively. As the old saying goes, "The smarter I work, the luckier I get."
- Do not pressure yourself into giving an inaccurate answer to a prospect's question. If you are unsure, tell the prospect you will check on the matter and will respond with the answer as quickly as possible.
- Be a problem solver. PMI accounts do not buy paint on impulse or whim. They usually do so because a problem must be solved.

QUESTION

3.14 The four key points of making a PMI call are:

1. _____
2. _____
3. _____
4. _____

ANSWER

3.13

80% of all new sales are made after **at least five calls** on the same prospect.

Summary

Before making the call, conduct your own frank self-analysis:

Ask yourself whether you:

- Know the market
- Know the competition
- Know the product
- Know your dealers
- Know your prospect

Do you have:

- All necessary sales tools?
- A positive attitude?

Are you prepared to close the sale?

Does your servicing dealer have:

- The desire and proper attitude to sell PMI business?
- Sufficient inventory?
- Realistic pricing?
- Trained personnel?
- A definitive understanding of how you plan to approach the market?

Be confident and straightforward. A PMI prospect will be more inclined to believe you if you believe in yourself, your products, and your company. You must exhibit this confidence at all times.

Be persistent and have a strong determination to succeed. Your prospect will appreciate a determined, confident, persistent sales effort. Recognize that it usually takes several calls to close a sale. Do not allow pessimism or discouragement to set in.

Be a professional! You are representing Benjamin Moore & Co. Your appearance and action are a direct reflection upon your company. Remember that first impressions are lasting ones. Sell our company image. To the PMI prospect, you *are* Benjamin Moore & Co.

Finally, ask for the order, then take it to the dealer.

NO RESPONSE REQUIRED.
PROCEED TO THE NEXT TABBED SECTION.

ANSWER

3.14

The four key points of making a PMI call are:

1. Try A New Approach: Put Color In Your Call.
2. Serve Your PMI Customers' Interests
3. Be Persistent
4. Don't Fear Rejection

The PMI Market

BLITZES
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PMI Blitzes

PMI BLITZ

The PMI blitz is an excellent and efficient means to solicit prospects for your dealers. It is an effective first step to begin PMI efforts in an area where PMI selling can be developed or with a new Benjamin Moore dealer.

A lot of planning and preparation is required to hold a successful PMI blitz. However, the resulting paint sales, increased knowledge of the market, and the goodwill generated make the efforts of the PMI blitz truly worthwhile.

INTRODUCTION

A PMI blitz is a pre-planned, concentrated outside sales effort designed to rapidly establish new commercial paint accounts for the dealer(s). While we refer to the program as a PMI blitz, architects, color consultants, and interior designers/decorators should be included in your list of planned calls. An effective PMI effort results in an increased knowledge of the market, the competition, pricing, and buying habits.

The benefits of a blitz to the dealer:

- Accelerated commercial account sales growth.
- A more serious, effective, and continuous dealer PMI sales effort during the time following the blitz.
- An educational process which will make the dealer and his personnel more effective in future PMI sales efforts.

The benefits to Benjamin Moore & Co.:

- More rapid sales growth with the dealer.
- Increased dealer loyalty and rapport.
- Some commercial accounts established through a blitz will also generate sales for Benjamin Moore dealers outside of the participating dealer's service area.
- A learning process which will make everyone more effective in all types of PMI activities.

QUESTION

4.1 PMI blitzes should also include:

1. _____
2. _____
3. _____

CRITERIA FOR SELECTING THE PROPER BLITZ MARKET

All plans for the blitz should be coordinated through, and approved by your District Sales Manager prior to making a commitment to a dealer.

1. Dealers should actively pursue the PMI trade, preferably with a full-time outside salesperson.
2. Dealers should understand the value of a blitz and be likely to make PMI calls on their own.
3. A new TCO requiring prompt penetration into the PMI market.
4. A TCO who needs his outside sales activities augmented.
5. Some downtown areas in and of themselves are large enough to support a separate blitz.
These would typically be in larger cities where high rents, poor parking, or other conditions have forced dealers into the outskirts and the downtown area has become neglected.
6. Dealers must be willing to provide effective blitz follow-up activities.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

ANSWER

4.1

A PMI Blitz should also include such firms as:

1. architects
2. color consultants
3. interior designers/decorators

PMI CALL POSSIBILITIES

The first step in preparing for a PMI Blitz is to prepare a master list of prospects to call on. Your first source should be your dealers. Have each of them prepare a list of prospects and current customers. Other names may be obtained from sources such as: yellow pages, Chamber of Commerce, PDCA roster, etc.

On this and the following pages we list groups suggested for inclusion on your master list, with a brief outline on approaching each group.

Painting Contractors

Work from organized phone lists and divide any prior phone contacts among the blitz participants. Contractors should be phoned the evening before the sales call to determine where the next day's call will be.

Institutional/Industrial

Make prior appointments with large firms since they often receive vendors only by appointment. It is best to do your initial "key people" search by phone. Normally, you will need to call on a purchasing agent, a chief engineer/head of maintenance, or a crew foreman.

QUESTION

4.2 Why is it essential to telephone a prospect before making sales call?

PMI Blitz: Call Possibilities

Hospitals

Prior appointments may not be necessary when calling on hospitals. You should call on the head of maintenance, the painting foreman/painter, and the purchasing agent since *each of them* may approve the supplier. Ask whether they operate with open purchase orders, which are a good way for us to get our foot in the door. Open purchase orders are usually set up for a specified time period and allow the paint shop to purchase incidental items without having to go through the purchasing agent on every occasion. You will also want to be placed on their bid list to insure an opportunity to bid on their larger purchases.

Public Schools

Even though most public schools are part of a city or county government, they usually buy paint on their own. Your initial calls should include the purchasing agent, Superintendent of Buildings and Grounds, and the painting foreman/crew. Ask if they operate with monthly open purchase orders.

Local Government: City/County

Your first call should be made to the purchasing agent who handles paint and related items. Ask the purchasing agent which of the various departments buy paint, and which person within each department makes the decision. Often several departments can set up their own open purchase orders for incidental purchases. If this is the case, pursue establishing open purchase orders from the various departments for our dealer, and work to have our dealer included on the approved list of vendors or their bid list. Most city and county governments will maintain a paint shop; be sure to call upon the paint shop foreman/crew. Without their support and approval, it is very difficult to accomplish the selling job.

QUESTION

4.3 Where individual departments can set up their own purchase orders, what should you do?

ANSWER

4.2

It is essential to telephone a prospect before making sales call because many firms receive vendors only by appointment. In addition, you need to know the job location when calling on contractors.

PMI Blitz: Call Possibilities

Architects, Color Consultants, Interior Decorators

The initial calls made on this group should be to gather information. Before we commit ourselves and our dealer to placing color and product specification materials, we first want to know how beneficial it will be. After all calls are made, we can determine which firms are the best for us to place materials with.

Condominium Complexes

The business potential here is exterior repainting. The decision as to which products will be used and where they will be purchased is made by the Homeowners' Association Board. The board is made up of elected homeowners, and in order to sell them, it is usually necessary to be invited to make a presentation at one of their regular board meetings. During a blitz, knock on doors within the complex and inquire as to the names and phone numbers of the board members. Once we have a name or two, the dealer can use the phone to try to set up a presentation.

Mobile Home Parks

The potential here is in the sale of Moorcraft products. Many mobile home parks have a community center, and it may be possible for you to leave Moorcraft brochures at the center or attached to the bulletin board. Make sure the brochures have the dealer's imprint stamped on them.

Prefabricated Housing

This market represents a very large gallonage potential.

ANSWER

4.3

Where individual departments can set up their own purchase orders, pursue establishing open purchase orders from the various departments for our dealer, and work to get our dealer on the approved list of vendors or their bid list.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

PMI Blitz: Call Possibilities

U.S. Postal Facilities

If there is a regional postal facility in the area, start there. If not, the main post office is next best. In many cases you will find that they operate their own paint crew out of the regional postal facility, so make sure you include a call on the painting foreman there.

Goodwill Industries, Salvation Army, and Others

These two organizations and many others like them operate their own thrift shops. They sell various merchandise which they have reworked in their own shops. Make your calls at the shop level since they use paint and sundries when they rework furniture, appliances, and other merchandise.

Food Processing and Bottling Plants

An important key to opening the door to business with these types of facilities is to bring supporting data showing the number of USDA approved products which we have in our line.

QUESTION

4.4 What should you remember when calling on U.S. Postal facilities?

CALL ORGANIZATION

After developing a complete list of PMI accounts, architects, and decorators, organize the calls into groups for the Calling Teams to use.

PAINTING CONTRACTORS

Again, you won't have much success trying to cold call painting contractors. Work from your master list of painting contractors and make phone calls to set up appointments. These appointments should be assigned to specific people. Contractors should be phoned a day or two ahead of the time you would like to call on them.

As each phone call is being made, fill out the *Painter Call Record** form so the Call Team will have what they need when they make the call. If possible, the dealer should make the calls with the Call Team.

Keep your organization and call records for painting contractors separate from the forms used for maintenance, institutional, industrial, architects, and decorator calls.

QUESTION

4.5 When making phone calls to arrange painting contractor appointments, what should you be doing?

* see page 36

ANSWER

4.4

Many local U.S. Postal Service offices and facilities operate their own paint crew out of the regional postal facility, so you should be sure to first call on the painting foreman there.

MAINTENANCE, INSTITUTIONAL, INDUSTRIAL, ARCHITECTS, INTERIOR DESIGNERS

Working from your master list, organize the calls for the Call Team.

1. Obtain large street maps, one for each Call Team, *i.e.*, if there will be four Call Teams, obtain four maps.
2. Divide up the total geographic areas to be covered in the blitz into defined quadrants, one quadrant per Call Team.
3. Place a numbered map tag (numerical sequence) on the appropriate Call Team map (quadrant) to indicate the exact location of the call.
4. Record each map tag number plus the account name, address, telephone number, and contact person onto a Blitz Call Record form. As you proceed, keep separate stacks of completed Blitz Call Record forms for each quadrant and Call Team.
5. After completing all map work and Blitz Call Record forms, put each Call Team's stack of forms in efficient call sequence so that backtracking or skipping can be avoided.

Sample forms are provided on the following pages.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

ANSWER

4.5

When making phone calls to arrange painting contractor appointments, fill out the Painter Call Record form so the Call Team will have the information they need when they make the call.

PMI PLANNING FORM & CHECKLIST

SPONSORING DEALER: _____ PHONE: (____) _____

DEALER'S ADDRESS: _____
ZIP Code

OWNER'S NAME: _____ PHONE: (____) _____

EMPLOYEE'S NAMES: _____

BM&CO. SALES REP: _____ PHONE: (____) _____

BM&CO. PARTICIPANTS ARE: _____
 (AS APPROVED BY _____
 DSM / CSD) _____

MOTEL RESERVATIONS WILL BE MADE BM&CO. PERSONNEL AT: _____

LOCATED AT: _____ PHONE: (____) _____

BLITZ STARTS ON: ____/____/____ AT ____ AM AND ENDS ON ____/____/____ AT ____
 PM.

BLITZ CALL TEAM ASSIGNMENTS — ASSUMING THAT CALL TEAMS WILL CONSIST OF TWO PEOPLE, THE SAME TEAM MEMBERS MAY EITHER BE SCHEDULED TO STAY TOGETHER FOR THE ENTIRE BLITZ OR THEY MAY BE ROTATED WITH NEW PEOPLE EACH DAY.

CALL TEAM	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
#1	_____ _____	_____ _____	_____ _____	_____ _____
#2	_____ _____	_____ _____	_____ _____	_____ _____
#3	_____ _____	_____ _____	_____ _____	_____ _____
#4	_____ _____	_____ _____	_____ _____	_____ _____
#5	_____ _____	_____ _____	_____ _____	_____ _____

Note: Whenever possible, one of the team members should be a person who knows the blitz area so that they can do the “navigating” for the other team member. Also, the dealer and his personnel should be involved in most calls made on Paint Contractors.

PMI PLANNING FORM & CHECKLIST

TASK/ITEM	ASSIGNED TO	COMPLETE BY (Date)	OTHER COMMENTS	COST (If any)
Create Call Lists for:				
Paint Contractors	_____	_____	_____	_____
Institutional	_____	_____	_____	_____
Apartments	_____	_____	_____	_____
Hospitals	_____	_____	_____	_____
Chain Specifications	_____	_____	_____	_____
Schools	_____	_____	_____	_____
Government	_____	_____	_____	_____
Real Estate	_____	_____	_____	_____
Hotels/Motels	_____	_____	_____	_____
Architects	_____	_____	_____	_____
Interior Designers	_____	_____	_____	_____
Others (define)	_____	_____	_____	_____
 Assemble Calling Materials:				
<small>QUANTITY</small> Calling Kits	_____	_____	_____	_____
<small>QUANTITY</small> Carry In Items	_____	_____	_____	_____
Trunk Supplies	_____	_____	_____	_____
 Map Work:				
<small>QUANTITY</small> Obtain Maps	_____	_____	_____	_____
<small>QUANTITY</small> Obtain Map "Tags"	_____	_____	_____	_____
Tag & Code all maps with calls	_____	_____	_____	_____
 Blitz Call Record:				
<small>QUANTITY</small> Layout & Printing	_____	_____	_____	_____
Fill-in Top Portion of Form	_____	_____	_____	_____
Put Forms in Logical Call Sequence (Use coded maps)	_____	_____	_____	_____
Divide Maps into Quadrants	_____	_____	_____	_____
Assemble All Call Team Material (ready for week's use)	_____	_____	_____	_____
Assign Prior Phone Contacts (Where Appointments Are Necessary)	_____	_____	_____	_____

CALLING KITS AND SUPPLIES

The Sales Representative should consider all company materials required for use in the blitz well in advance of its starting date. These materials should be ordered in time to receive them and to completely organize them into kits for the blitz sales teams. This project should be completed before the blitz starts.

The recommended components for the Calling Kits and other supplies will be defined for three different categories:

1. **Calling Kit**, which is left with the prospect.
2. **Carry-In items**, which you have available (in-hand) for reference use.
3. **Trunk Supplies**, which you may need in order to successfully complete the call, and to replenish your carry-in supplies as they are depleted.

Suggested components for the foregoing kits are noted on the following pages.

QUESTION

4.6 List the three categories of supplies for the blitz:

1. _____
2. _____
3. _____

CALLING KIT

Twin-pocket heavy paper folders should be used. If these are not available from Benjamin Moore & Co. in the quantity you will need, the dealer should purchase his own folders and either attach one of his business cards to the front or have a local printer imprint the front.

There are two possible approaches to completing the kits: Totally assemble the kits for each type of call to be made, or organize large boxes which contain all the loose materials needed for all types of calls. Each blitz sales team should then assemble a customized kit before making each call.

QUESTION

4.7 The important point about preparing calling kits is

ANSWER

4.6

1. **Calling Kit**, which is left with the prospect.
2. **Carry-In items**, which you have available in-hand for reference use.
3. **Trunk Supplies**, which you may need in order to successfully complete the call, and to replenish your carry-in supplies as they are depleted.

CUSTOMIZED KIT SUGGESTIONS

Regardless of the approach taken in assembling the kits, you will need the following materials:

- Twin-pocket heavy paper folders.
- Dealer business cards.
- Printed list of the dealer's major product lines and services.
- Price list (optional). If a price list is included, it should list a few key paint and sundry products only.
- Appropriate color cards and brochures for our products and other important products carried by the dealer.

Because of the variety of calls to be made, customize the literature and materials for each call. Suggestions are:

Painting Contractors

- Regal Products Color Cards
- Regal AquaGrip Technical Data Sheet
- Wall-Grip Brochure
- Interior Wood Finishes Color Card
- MoorGard/MoorGlo Color Card
- Moorwood Color Cards
- Moorwood Clear Wood Finish & Preservative Brochure
- Concrete Stain Color Card
- Porch and Floor Enamel Color Card
- Moorcraft Professional Coatings Manual
- IronClad Specification Sheets
- Moorlastic Brochure

QUESTION

4.8 All kits should contain at least the following five items:

1. _____
2. _____
3. _____
4. _____
5. _____

ANSWER

4.7

The important point about preparing calling kits is to have them assembled and ready *before* making the call.

Maintenance Facilities

- Regal AquaVelvet Color Card
- Regal AquaVelvet brochure
- Regal AquaGrip Technical Data Sheet
- Moorwood Color Card (for stained exteriors)
- MoorGard/MoorGlo Color Card (for painted exteriors)
- MoorLife Color Card
- Moorwood Clear Wood Finish & Preservative Brochure
- Swimming Pool Paint brochure
- Concrete Stain and/or one of our floor paint Color Cards
- Interior Wood Finishes Color Card
- Wall-Grip Brochure
- Moorcraft Professional Coatings Manual
- Moorlastic Brochure

Institutional Facilities

- IronClad Brochure
- Concrete Stain
- Impervex or Impervo Enamel Color Card
- Regal Finishes Color Card
- Regal AquaGrip Technical Data Sheet
- MoorGard/MoorGlo Color Card
- Moorcraft Professional Coatings Manual

Architects and Decorators

- Specifications Manual
- Moorwood Color Cards and Fan Decks
- Moorwood Clear Wood Finish & Preservative Brochure
- Regal AquaVelvet Color Card
- Regal AquaGrip Technical Data Sheet
- MoorGard/MoorGlo Color Card
- MoorLife Color Card
- Historical Interior and Exterior Color Card
- Exterior Expressions Color Card
- Concrete Stain Color Card

Note: The Moorwood Manual and MOM III Designer Color Selector should be carried for reference use.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

ANSWER

4.8

1. Twin-pocket folders
2. Dealer's business cards
3. List of dealer's major product lines and services.
4. Price list
5. Color cards and brochures.

CARRY-IN ITEMS

In addition to the appropriate kit taken into the call, the following materials should be carried in for reference:

- Moor-O-Matic III Fan Deck
- Maintenance Coatings Manual or Specifications Manual
- Separate business cards for the dealer and yourself
- Color Card Manual with appropriate material
- Clipboard with a blank *Painter Call Record* form to be filled out during call.
- Price list of the dealer's "key products"

QUESTION

4.9 List the six carry-in items:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

TRUNK SUPPLIES

All Benjamin Moore personnel participating in a blitz should arrange to have the following materials available in their trunk for reference use:

- Extra Moor-O-Matic III Fan Decks
- Moor-O-Matic III Designer Color Selector
- Extra Industrial Maintenance Manuals
- Extra Color Card Manuals
- Emergency supply of color cards
- Supply of their own business cards
- Dealer Product Manual
- Chain Specification Manual
- Moorcraft Professional Coatings Manual
- Specifications Manual
- Moorwood Manual
- All How-To Folders
- All miscellaneous product literature
- Moorwood Fan Decks
- Product demonstration materials
- MSDS Manual
- List of USDA Approved Products
- Moorlastic Brochure

ANSWER

4.9

When making a call, the following materials should be in-hand for reference:

1. Price list of the dealer's "key products"
2. Moor-O-Matic III Fan Deck
3. Industrial Maintenance Manual
4. Business cards for both the dealer and yourself.
5. Complete Color Card Manual
6. Clipboard with a blank PMI Call Record form to be filled out during call.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

MAKING THE CALLS

1. All Call Team members should be at the meeting location early each morning ready to start the blitz.
2. Call Team members who are using their cars for the blitz should arrive with the necessary trunk supplies as recommended under “Calling Kits & Supplies.”
3. All Calling Kits and Call Organizational Materials should be customized prior to each call.
4. The local Sales Representative should review all materials and procedures with the group.
5. A Call Team should consist of no more than two people.
 - If the Call Team members rotate each day with someone new, there is the advantage of everyone broadening their experience.
 - If Call Team personnel do not rotate, there is the advantage of each team becoming more effective as the week progresses.
 - Depending on the total number of people involved and their individual experience levels in making PMI calls, you might want them to make calls on their own.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

PMI Blitz: Making the Calls

6. Make every effort to talk to the individual who picks the colors and specifies the paint, such as the head painter, maintenance foreman, or engineer.
The purchasing agent usually just processes a requisition into a purchase order. By asking the receptionist if you can talk to someone in charge of painting, you often are directed to the person you need.
7. When you speak to the decision maker:
- Ask if they are currently using our products and, if so, from whom they purchase.
 - Determine their immediate and future needs.
 - Have a prepared set of questions.
 - Demonstrate a product.
 - Leave something which will remind them of your call (*i.e.*, business card).
 - Never leave all color cards or literature on one call; this provides a perfect opportunity for a follow-up call.

QUESTION

4.10 Why is the purchasing agent not the best person to attempt a sale with?

4.11 Whom should you seek out to talk with?

1. _____
2. _____
3. _____

PMI Blitz: Making the Calls

8. While making the actual calls
- The non-driver of the two-person Call Team should do the navigating using the call map provided and their preorganized stack of call report forms.
 - On each call, one of the team members must take in the Calling Kit appropriate for the type of prospect (*i.e.*, Painter, Maintenance/Apartment, Institutional, or Architect/Interior Designer).
 - To insure accuracy and completeness, one team member should be responsible for filling out a call report while the call is actually being made.

ANSWER

4.10

The purchasing agent's job is usually just to process a requisition into a purchase order. He does not specify the product or the company from which the product is to be purchased.

4.11

The people you want to talk to are those with decision-making authority, such as those who:

1. select colors.
2. specify paint.
3. are in charge of paint departments.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

PMI Blitz: Making the Calls

9. Call Objectives of the Blitz Call

- To introduce the dealer's business, products and services.
- To pave the way for future follow-up calls, which will lead to sales development.
- To gather and record as much pertinent information as is possible about each prospect.
- To obtain an order!

At the end of each day all Call Team personnel should meet at the meeting location, with the dealer if possible, and using their completed Call Record forms, review each call, resolve problems, coordinate follow-up activities, and set up the next day's schedule.

Before leaving the meeting location at the end of each day, phone calls should be made to painting contractors, large institutional/industrial accounts, and to any other firm requiring prior appointments.

QUESTION

4.12 In your own words, summarize the four possible call objectives noted above.

1. _____

2. _____

3. _____

4. _____

PRINTED MATERIALS

All PMI Blitz materials used should be carefully thought out and be professional in appearance!

Sloppy printed materials will diminish the important impression we are trying to make on the potential new customers!

AT THE CONCLUSION OF THE BLITZ

1. Return all unused materials.
2. Return call reports to the local Sales Representative, and indicate follow-up requirements.
3. Make a composite list, in order of follow-up priority, of calls made by type and materials left.
4. The District Sales Manager should complete the PMI Blitz report form and forward it to the divisional sales office.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

ANSWER

4.12

The Call Objectives of the Blitz Call are:

1. To obtain an order.
2. To introduce the dealer's products and services.
3. To establish a reason for follow-up calls.
4. To gather and record pertinent information.

FOLLOW-UP

The most important part of a PMI blitz is the *follow-up* — the calls made after the blitz is finished.

A PMI blitz should never be held without a prior commitment by the dealer to undertake an ongoing, planned program of follow-up calls. This ensures the success of everything that we and the dealer have invested.

The Benjamin Moore Sales Representative who sponsors a PMI blitz has a significant responsibility in the follow-up phase as well.

QUESTION

4.13 What is the most important phase of a Blitz?

4.14 A PMI blitz should not be held without:

1. _____
2. _____

PMI Blitz: Conclusion and Follow-Up

A typical follow-up schedule might be as follows:

1. If 205 calls were made:
 - 37 require immediate follow-up
 - 39 require follow-up within one month
 - 40 require follow-up within three months
 - 56 as schedule permits
 - 33 no follow-up required
2. Since this is a large work load for one Sales Representative, the dealers should assist. If one individual helps with the follow-up, the dealer and the Sales Representative need only follow up on 18 immediately, 19 or over in four weeks, 20 within three months, and 28 as schedule permits. This makes the follow-up process manageable.
3. A follow-up mini blitz, if necessary, could be scheduled at an appropriate time.

Immediately at the conclusion of the blitz, you should meet with the dealer to carefully review all calls that were made. The Painter Call Record and Blitz Call Record forms should be put in call priority order and a follow-up call date should be scheduled for each call.

You should assist the dealer in making some of the follow-up calls, but most importantly, you should meet with the dealer to review what has been accomplished and to plan what must still be done.

ANSWER

4.13

The most important part of a PMI blitz is the *follow-up* — the calls made after the blitz is finished.

4.14

A PMI blitz should not be held without:

1. Prior approval by and the coordination of the District Sales Manager
2. A commitment by the dealer to follow through with a continuing sales effort after the conclusion of the Blitz.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

PMI Blitz: Conclusion and Follow-Up

Remember, an effective follow-up call system goes well beyond just one follow-up call. Several follow-up calls will have to be made on some of the blitz prospects before sales actually develop.

To facilitate follow-up calls and to help provide additional information use the reverse side of the original Painter Call Record and Blitz Call Record forms.

If the PMI blitz is conducted properly, we should achieve a number of these desired goals:

1. A significant sales impact on the PMI market.
2. We should know our competition and what they are doing, and how to effectively compete.
3. The individual making the follow-up call knows whom to see, what their needs are, what materials were left, by whom, and on what date.
4. To encourage the dealers to recognize the lucrative market that awaits them.

**A PMI BLITZ WILL NEVER BE SUCCESSFUL
UNLESS THERE IS A GOOD FOLLOW-UP!**

NO RESPONSE REQUIRED.
PROCEED TO THE NEXT TABBED SECTION

The PMI Market

BIDDING
BIDDING
BIDDING
BIDDING
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BIDDING

An additional source of PMI business which may have been overlooked by the dealers is bidding. Dealers may feel that bidding requires an inordinate amount of time and effort; that they don't know how to submit a winning bid; that the probability of their winning the bid is minimal; that the profit margin is too low for the investment in time and work; or that for any number of other reasons it is not worthwhile submitting a bid.

You can show your dealers, however, that by following some simple steps it is possible to profit from additional business beyond their normal gallonage by pursuing bid work.

TYPES OF BIDS

Essentially there are three types of bids:

the open bid, the closed bid, and the total bid.

The **open bid** is a bid in which anyone can bid.

The **closed bid** is a bid which is not open for public review, but rather is sent by the institution or agency to a selected number of bidders. Closed bids are not generally permitted by government agencies.

The **total bid** is a bid in which one supplier gets all of the items on the bid, as opposed to each item being awarded individually. The items may be shipped all at once, or as needed.

It is important to remember that purchasing agents do not select products that are placed for bid; they only select the approved source for the product.

QUESTION

5.1 In your own words, define a:

1. open bid _____

2. closed bid _____

3. total bid _____

OBTAINING AN INVITATION TO BID

The first step in the process is to be included on the various bid lists. To do so, call the purchasing agent by phone or appear in person and ask for the application form in order to be placed on the bid list. Additionally, the dealer should look in the newspaper for advertised bids. It is important to remember that there are special bids in which a percentage of the business to be bid is awarded to minority businesses or as a part of the Small Business Set Aside program. The minority bid is open only to minority-owned companies (those in which a minority owns 51% or more of the business).

QUESTION

5.2 What is the primary step to take in obtaining business from an organization which purchases using bids?

5.3 A minority bid is one which can be awarded only to a minority company. Define a minority company.

ANSWER

5.1

- 1.** An **open bid** is one on which anyone can bid.
- 2.** A **closed bid** is one which is sent to a selected list of bidders. Closed bids are not generally permitted by government agencies.
- 3.** A **total bid** is one in which one supplier gets all of the items on the bid, as opposed to each item being awarded individually. The items may be shipped all at once, or as needed.

GOVERNMENT AGENCIES WHICH SOLICIT BIDS

We stress that government agencies should be pursued by the dealer; however, you should supply and assist them with any required information.

The U.S. government (as well as state and local municipalities) may from time to time issue requests for bids on certain types of paints. Some U.S. agencies which request bids are:

- 1. Federal**
- 2. Armed Forces, including U.S. Coast Guard**
- 3. Bureau of Reclamation**
- 4. Corps of Engineer Specifications**
- 5. Department of Transportation–Federal Highway Administration**
- 6. Navy Department–Naval Facilities Engineering Command**
- 7. State Highway Association**
- 8. U.S. Postal Service**

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

ANSWER

5.2

In order to obtain business from an organization which purchases using bids, you must first get onto their bid list so that you will be invited to make bids.

5.3

A minority company is one which is more than half owned by persons who are members of a recognized minority.

Bidding: Obtaining an Invitation to Bid

Listed below are locations of several Federal agencies that may be contacted.

1. Federal specifications, write to:

General Services Administration

Specifications Section, Room 6654

7th and "D" Streets, SW

Washington, D.C. 20407

Phone: (202) 708-9205

2. Military specifications:

General Services Administration

Specifications Section, Room 6654

7th and "D" Streets, SW

Washington, D.C. 20407

Phone (202) 708-9205

3. Bureau of Reclamations specifications:

Bureau of Reclamations

Engineering and Research Center

Attention: D-3523

P.O. Box 25007

Denver, CO 80225

Phone (303) 236-6934

4. Corps of Engineers specifications:

Department of the Army

Corps of Engineers

Publications Depot

2803-52nd Avenue

Hyattsville, MD 20781-1102

Phone: (301) 436-2063

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

Bidding: Obtaining an Invitation to Bid

5. Navy Department, Naval Facilities:

**Engineering Command Naval Publications and
Forms Center**

700 Robbins Avenue

Philadelphia, PA 19111

Phone: (215) 697-2594

6. State Highway Association (AASHTO):

**American Association of State Highway
and Transportation Officials**

444 North Capitol Street, NW, Suite 225

Washington, D.C. 20001

Phone: (202) 624-5800

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

**A SAMPLE
“REQUEST TO BE ADDED TO BID LIST”**

The following is an example of a letter which one might use to be placed on a bid list.

To Whom It May Concern:

This letter is to formally request that (Name of Business) be added to your bid list, and be considered as a regular supplier for any future purchases of any paint or related paint products.

We presently warehouse large quantities of stock and are backed by local warehouses with a wide variety of paints, stains, spray equipment, rentals, wall coverings, and a complete line of related sundries. We are an independently owned and operated company, yet fully capable of competing with any paint supplier competitor. We offer free delivery and on-the-job assistance at any time at no charge. We also have a unique ability to locate rare or difficult-to-find products. At your convenience, please confirm your acceptance of this request.

*Respectfully yours,
Name of Owner.*

QUESTION

5.4 Letters to request being placed on a bid list may be directed to:

1. _____
2. _____
3. _____

PROCEDURES FOR BIDDING

You should assist the dealer in the bidding process. It shows your interest in their business, and it gives you the chance to make sure all the discounts are considered. If a bond or a good faith check is required, explain to the dealer that it will be returned. Many local governments either are mandated or try to give their business to the local, small business person.

FILLING OUT BIDS

After being placed on the bid list, whenever bids are requested your dealer will receive a bid package. In the packet are the instructions for filling out the bid. Among the documents to be filled out may be:

1. A list of references.
2. A non-collusion affidavit.
3. An Affirmative Action Report and Affidavit.
4. A statement of ownership.
5. A requirement for bonding—usually for the total amount of the bid. You may obtain a bond through an insurance company, or the dealer may submit a certified check in the amount of 10% of the total bid.
6. A list of the materials for which bids are requested.
7. A minority bid or Small Business Set Aside Form.

QUESTION

5.5 The documents which may be in a bid package include:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

ANSWER

5.4

Letters to request being placed on a bid list may be directed to:

1. Purchasing agents.
2. Procurement officers or managers of government agencies.
3. Business administrators

TIPS ON BIDDING

Winning bids is a simple, straightforward process:

1. Find the source: such as the municipal building, city hall, school district, government office or installations.
2. Find the right person: the controller, purchasing agent, procurement officer or business manager.
3. Ask questions. There are several laws on government public information, such as the Sunshine Laws and the Freedom of Information Act. These laws give you specific rights to ask for and see any public bid. Sometimes they'll even give you copies.
4. Read all the information. Look for opening dates, terms, delivery requirements, container sizes, specifications, colors, and terminology.
5. Submit the bid. Use good judgment in pricing; keep in mind that this is additional "found" business. Look at the total bid. You may have to adjust prices to be competitive.

QUESTION

5.6 Included in the process to win bids are the following steps:

1. _____
2. _____
3. _____
4. _____
5. _____

ANSWER

5.5

The documents which may be found in a bid package include:

1. A list of references
2. A non-collusion affidavit
3. An affirmative action report and affidavit
4. A statement of ownership
5. A requirement for bonding
6. The list of materials
7. The minority bid or Small Business Set Aside Form

ATTENDING THE BID OPENING

1. Make sure that your bid is in by the bid deadline date and that it is opened.
2. Remember that sometimes a competitor will be a low bidder on a particular product, but may be disqualified because the product does not actually meet the specifications. Find out who wins the bid and, if possible, ask to see the winning bid.
3. Whether or not your bid is accepted, find out as much as you can about your competitor's bids. On government bids this is usually public information, although it might be otherwise with private companies. It will help you in future bidding to know how high or low you can expect your competitors to bid.

QUESTION

5.7 Why is it important to attend the bid opening?

1. _____

2. _____

ANSWER

5.6

Included in the process to win bids are the following steps:

1. Find the source.
2. Find the right person.
3. Ask questions.
4. Read all information.
5. Submit the bid.

KEYS TO WINNING BIDS

Winning bids requires a specific strategy and action on your part:

1. Obtain a copy of the prior year's bid. This will give you competitive information that will spell out the pricing, terms, delivery dates, etc., that caused your competitor to win the bid.
2. Try to find out who else is bidding.
3. Be persistent in your bidding effort. As you gain experience you will learn how to complete the bidding process efficiently, and you will develop a feeling for what prices win bids.
4. Know your competition.
5. Remember that although Benjamin Moore & Co. doesn't bid directly, your dealers can take advantage of various special discounts which can make them more competitive, i.e., contractor dating, spring and fall datings, etc.

QUESTION

5.8 As part of your preparation for the bidding process, you should:

1. _____

2. _____

3. _____

4. _____

5. _____

ANSWER

5.7

It is important to attend the bid opening:

1. To make sure your bid is in and that it gets opened.
2. To obtain competitive information for future use.

PRICING STRATEGY WHEN BIDDING

It is important to show only list prices for bids. Make any pricing concessions by adjusting the percent of discount to meet competition, since discounts can and do vary among competitors.

Maintaining the list price and using various levels of discounts offers several advantages. They include:

1. If payment is not received within the specified terms, the list price prevails.
2. If additional gallonage is ordered beyond the bid quantities, the list price prevails.
3. If the bid does not specify Moor-O-Matic colors or special mixes, list prices may prevail.

Also, try not to show a net price; not doing so will allow room for adjustment when necessary.

QUESTION

5.8 When bidding, what are the advantages of quoting list price and then discounting from list, rather than simply quoting a low net price?

1. _____

2. _____

3. _____

ANSWER

5.8

As part of your preparation for the bidding process, you should:

1. Get a copy of the prior year's bid.
2. Try to find out who else is bidding.
3. Be persistent in your bidding effort.
4. Know your competition.
5. Remember that your dealers can take advantage of various special discounts which can make them more competitive.

SUMMARY

As noted, the bidding process is not difficult; but it does require some experience. This business is above the dealer's normal gallonage sales and represents an additional source of income for the dealer.

NO RESPONSE REQUIRED.
PROCEED TO NEXT TABBED SECTION.

ANSWER

5.8

When bidding, quoting list price and then discounting from list allows these advantages:

1. If payment is not received within the specified terms, the list price prevails.
2. If additional gallonage is ordered beyond the bid quantities, the list price prevails.
3. If the bid does not specify Moor-O-Matic colors or special mixes, list prices may prevail.

The PMI Market

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COLOR

This section may appear long, but it should not take much time to complete because it is designed to permit you to selectively review, in one centralized, convenient place, basic color theory as it relates to the PMI market. It is not our intent to make you color specialists; rather, this section is structured to allow you to study only those areas of interest.

The most important understanding you can gain from this section is that color plays a significant role in developing PMI business. Your recognizing the relationship between color and how it can solve PMI paint application problems will make you more effective at selling.

At the end of this section, we examine the role of Benjamin Moore's Color Planning Department, and review how the Color Planning Department can help you and your dealers increase PMI paint sales.

THE IMPORTANCE OF COLOR IN TODAY'S MARKET PLACE

The practical application of color for the PMI market is based upon color's psychological, emotional, and visual effects.

The use of color theory is now widely accepted as an effective way to stimulate greater productivity, promote greater physical and mental well-being, and reflect reassuring professionalism.

These aspects are incorporated into our color recommendations, giving dealers and paint contractors an edge when bidding jobs. By specifying finishes as well, these color recommendations can assure that our products are used.

Also, by including coordinating products, such as flooring, laminates, roofing, and window treatments, customers are saved the frustration of indecision when creating a complete scheme.

We will examine how color can be effectively used in five areas:

- Commercial buildings
- Factory environments
- Health care facilities
- Educational facilities
- Safety color codes for marking physical hazards and pipes.

Consideration in selecting colors includes: lighting, gloss, hue, visibility, surface, light reflectance,* location, harmony, and purpose.

** Refer to Moor-O-Matic III Color Selector Fan Decks, Professional Color Selector Books, Designer Color Selector, and Custom Color Selector.*

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

POINTS TO REMEMBER

- Light colors (tints) reflect more light.
- Light colors create the illusion of larger space.
- Light colors render objects lighter in weight.
- Large areas can contain deeper color.
- Dark colors seem to advance, creating the illusion of smaller space.
- Dark colors render objects heavier in weight.
- Dark floors are impractical because they reveal more dust and footprints.

QUESTION

6.1 List some properties of **light** colors:

1. _____
2. _____
3. _____

List some properties of **dark** colors:

1. _____
2. _____
3. _____

COMMERCIAL BUILDINGS

Offices and public areas such as lobbies and restaurants can all benefit from color planning. For example, color can be used to enhance productivity in offices.

Some considerations include:

- Color can be used to create a positive, pleasant environment with a feeling of orderliness and professionalism.
- White is much too light-reflective and may create anxiety and irritability as well as vision problems.
- Personalizing private work spaces with preferred color will minimize the lack of privacy.
- Long, monotonous corridors should be broken up with another color.
- Warm tones can stimulate a feeling of welcome in public areas.
- Using warm tones in restaurants will stimulate appetites and discourage dallying.
- Using greens with a balance of warm tones can give hotel visitors a sense of security.

QUESTION

6.2 What is the effect of using white in commercial buildings?

ANSWER

6.1

Light colors:

1. reflect more light.
2. create the illusion of larger space.
3. render objects lighter in weight.

Dark colors:

1. create the illusion of smaller space.
2. render objects heavier in weight.
3. reveal more dust and footprints.

HEALTH CARE FACILITIES

Color has an important impact on both the patients and workers in health care facilities. While color can physiologically affect blood pressure and heart rate, its consideration must also include creating an environment that reflects care and nurturing yet at the same time a high level of professionalism.

Some aspects to be addressed in such areas include:

- Warmer tones should be used in occupational therapy, pediatrics and maternity areas.
- Cooler colors should be used for intensive care and recovery areas.
- Avoid purple (which is disconcerting and connected with mourning) as the elderly often cannot distinguish the blue-violet end of the spectrum.
- Avoid highly reflective pale flooring (which visually distorts).
- Cool blue-greens/greens in mental health facilities relax the patients (as these colors do not tax the senses).
- A pale ceiling color will add interest for reclined, stationary patients.

QUESTIONS

6.3 Where should warmer colors should be used?

6.4 Where should cooler colors should be used?

ANSWER

6.2

White is much too light-reflective and will create anxiety and irritability as well as vision problems.

EDUCATIONAL FACILITIES

Color usage in educational facilities is important in fostering study. Aside from controlling glare, color should be used to reduce monotony, enhance concentration, and provide a stimulating environment for physical education.

To do so:

- Use greens in a library environment.
- Use warmer tones to balance the extroverted nature of elementary school children.
- Accent the front of the classroom to direct the students' attention toward the instructor.
- Create a warm atmosphere in auditoriums and gymnasiums.

QUESTION

6.5 How could color be used helpfully in a classroom environment?

ANSWERS

6.3

Warmer colors should be used in occupational therapy, pediatrics and maternity.

6.4

Cooler colors should be used for intensive care and recovery.

FACTORY ENVIRONMENTS

The morale and physical well-being of factory workers are directly affected by the use of color. Workers exposed to heat, noise, or odor and the monotony of repetitive movement can be positively conditioned by color usage, which will in turn affect the quality and quantity of their work.

Some key aspects to the proper use of color would be:

- OSHA safety colors help alert employees to areas or situations which require attention and cautious behavior. (The Occupational Safety and Health Administration, a federal agency, is charged with creating and enforcing safety standards in the workplace.)
- Color can help compensate for both high pitched and muffled sounds.
- Specific colors will compensate for a range of odors from sweet to sour to bitter and musky.
- Color will allude to dryness or moisture as needed and create warm or cool atmospheres.
- Lively colors stimulate a higher degree of speed and muscular effort.
- A variety of color will break the monotony of the workplace and help identify different production areas.
- Light color will compensate for lack of windows or light.

QUESTION

6.6

OSHA stands for: _____

ANSWER

6.5

Color could be used in a classroom environment to accent the front of the classroom, directing the students' attention toward the instructor.

OSHA SAFETY COLOR CODES FOR MARKING PHYSICAL HAZARDS AND PIPE IDENTIFICATION

Color has been recognized as an important factor in plant safety for many years. Records clearly show that accident rates have been lowered through color identification of danger points. A decrease in personal injuries as great as 40% has followed the use of a uniform color program. These results are realized because of greater visibility and the positive identification of hazards.

The safety index of the plant rises noticeably when dangerous parts and objects are marked with attention-impelling colors, when aisleways are outlined with zone marking lines, and when dark passageways and areas are made lighter with light reflecting colors.

The Safety Color Code for Marking Physical Hazards and Pipe Identification provides an orderly coordinated standard of practice for any plant in any industry. This enables workers to quickly locate and identify all hazards and safety devices and prepares them in advance for any emergency.

With wide use of this code, workers can go from one department or plant to another—they may even change jobs and know that the color signals they see indicate the same things.

More information on this subject can be obtained from
The American National Standards Institute (ANSI)
1430 Broadway, New York, NY 10018.

QUESTION

6.7

ANSI stands for: _____

ANSWER

6.6

OSHA stands for the Occupational Safety and Health Administration, a federal agency charged with creating and enforcing safety standards in the workplace.

PRINCIPLES OF SAFETY COLOR CODING

1. Colors must follow a logical pattern.
2. Colors should attract attention and result in a specific association for each color. The reaction should be immediate and positive. There must be no doubt in the mind of the observer as to the message conveyed.
3. Maximum visibility is another important consideration. The fact that some people are color blind should also be considered.
4. All colors and painting dimensions must meet local, state, and federal laws and regulations.

NOTE: All references to OSHA safety colors can be found in the Maintenance Coatings Manual or Specifications Manual.

QUESTION

- 6.8** What is the key point to remember when discussing the use of safety colors and painting dimensions?

ANSWER

6.7

ANSI stands for American National Standards Institute.

OSHA SAFETY RED

Use OSHA SAFETY RED to designate **fire protection equipment**, containers of **flammable liquids, lights at barricades and obstructions, emergency stop bars, and switches on machinery**.

1. FIRE-FIGHTING RELATED

Thoughtful use of this color at the location of hose lines and extinguishers can make identification by employees quick and positive during an emergency.

To accomplish this, paint a square of OSHA SAFETY RED on the wall where the equipment hangs. If the hose or extinguisher is on a column, use a color band completely around the column at eye level.

Specific items to be painted OSHA SAFETY RED include:

- Fire Prevention Equipment
- Fire Alarm Boxes
- Fire Blanket Boxes
- Fire Buckets or Pails
- Fire Extinguishers
- Fire Pumps
- Fire Sirens, Fire Exit)
- Signs
- Sprinkler Piping
- Fire Hydrants
- Industrial Fire Hose Location (Housing reel and support only)
- Post Indicator Valves for sprinkler systems (If traffic hazard is involved, the top should be colored OSHA SAFETY RED and the barrel or post OSHA SAFETY YELLOW with OSHA SAFETY BLACK stripe.)

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

ANSWER

6.8

The key point to remember when discussing the use of safety colors and painting dimensions is that all must meet local, state and federal laws and regulations.

OSHA SAFETY RED (CONTINUED)

2. DANGER

Safety cans or containers for flammable liquids (excluding shipping containers).

Red lights at barricades, at temporary obstructions and on temporary construction as specified in American National Standard Safety Code for Building Construction, A10.2-1944.

Danger signs shall be painted OSHA SAFETY RED. (See American National Standard Specifications for Industrial Accident Prevention Signs, Z35,1-1959)

3. STOP

Emergency stop bars on hazardous machines such as rubber mills, wire blocks, flat work ironers, etc., shall be OSHA SAFETY RED.

Stop buttons or electrical switches used for emergency stopping of machinery shall be OSHA SAFETY RED.

QUESTION

6.9 OSHA SAFETY RED is used to denote:

1. _____
2. _____
3. _____

OSHA SAFETY ORANGE

Use OSHA SAFETY ORANGE to designate **dangerous parts of machinery and equipment**.

OSHA SAFETY ORANGE is used as the basic color for designating dangerous parts of machines or energized equipment which may cut, crush, shock, or otherwise injure. It is used to emphasize such hazards when enclosure doors are open or when gear, belt, or other guards around moving equipment are open or removed, exposing unguarded hazards.

When OSHA SAFETY ORANGE is used, the fact that the door is open or the guard removed becomes obviously apparent. Similarly, the failure to restore a guard, screen, or cover is amply advertised and the oversight more promptly corrected.

Suggested Uses:

- Inside of movable guards such as picker guards in textile plants.
- Safety starting buttons.
- Inside of transmission guards for gears, pulleys, chains, etc.
- Exposed parts (edges only) of pulleys, gears, rollers, cutting devices, power jaws, etc.
- Inside of electrical switch boxes, fuse boxes.

QUESTION

6.10 OSHA SAFETY ORANGE is used to denote:

1. _____

2. _____

ANSWER

6.9

OSHA SAFETY RED is used to denote

1. fire-fighting-related equipment including piping
2. danger
3. stop

OSHA SAFETY YELLOW

Use OSHA SAFETY YELLOW to designate **caution**.

Mark physical hazards such as:

Striking against, stumbling, falling, tripping, and
“caught in between.”

Suggested Uses for OSHA SAFETY YELLOW include:

- Construction Equipment
- Corner markers for storage piles
- Coverings or guards for guy wires
- Exposed, unguarded edges of platforms, pits, and walls
- Handrails and guardrails
- Top and bottom treads of stairways
- Lower pulley blocks and cranes
- Markings for projections, doorways, conveyors, low beams, and pipes
- Frames of elevator ways and elevator gates
- Material handling equipment (or parts)
- Pillars, posts, or columns
- Caution signs

NOTE: Solid OSHA Safety Yellow and Black Stripes and OSHA Safety Yellow and Black checkers may be used interchangeably.

QUESTION

6.11 OSHA SAFETY YELLOW is used to denote:

ANSWER

6.10

OSHA SAFETY ORANGE is used to:

1. denote dangerous parts of machines, or energized equipment.
2. emphasize such hazards as removed equipment guards and open guard doors.

OSHA SAFETY BLUE

Use OSHA SAFETY BLUE to designate **caution**, but limited to warning against the starting, use, or movement of equipment under repair or being worked upon.

The OSHA SAFETY BLUE symbol is to warn against operation of equipment which is undergoing repair and could cause injury to workmen if started. OSHA SAFETY BLUE circular signs are the standard indication that a train or car is not to be moved.

Warnings such as painted barriers, flags, etc., should be located at the starting point or power source of machinery and displayed conspicuously.

Suggested Uses for OSHA SAFETY BLUE include:

- Elevators
- Ovens and vats
- Boilers
- Electrical controls
- Dryers
- Valves
- Tanks
- Kilns
- Vaults
- Scaffolding and ladders.

QUESTION

6.12 OSHA SAFETY BLUE is used to denote:

ANSWER

6.11

OSHA SAFETY YELLOW is used to denote caution.

OSHA SAFETY GREEN

Use OSHA SAFETY GREEN to designate **safety and first aid equipment**.

Suggested Uses for OSHA SAFETY GREEN include:

- Location of First Aid Dispensaries
- Location of First Aid Kits
- Location of Gas Masks
- Location of Stretchers
- Bulletin Boards
- Safety Deluge Showers or their location
- Safety Instruction Signs

QUESTION

6.13 OSHA SAFETY GREEN is used to denote:

ANSWER

6.12

OSHA SAFETY BLUE is used to denote caution against the starting, use, or movement of equipment under repair.

OSHA SAFETY PURPLE

Use OSHA SAFETY PURPLE to designate **radiation hazards**.

Suggested Uses for OSHA SAFETY PURPLE include:

- Rooms and areas (outside or inside buildings) where radioactive materials are stored or handled, or which have been contaminated with radioactive materials.
- Disposal cans for contaminated equipment that is not placed in special storage.
- Signal lights used to indicate where radiation-producing machines are in operation.
- Burial grounds and storage areas for contaminated materials and equipment.

NOTE: OSHA SAFETY YELLOW should be used in combination with PURPLE for markers such as tags, labels, signs, and floor markers.

QUESTION

6.14 OSHA SAFETY PURPLE is used to denote:

ANSWER

6.13

OSHA SAFETY GREEN is used to denote safety and first aid equipment.

OSHA SAFETY BLACK & WHITE

Use BLACK and WHITE to designate **traffic and housekeeping** markings.

NOTE: Solid WHITE, solid BLACK, single color striping, alternate stripes of BLACK and WHITE or BLACK and WHITE checkers may be used in accordance with local conditions.

Suggested Uses for OSHA BLACK and WHITE include:

- Dead ends of aisles and passageways.
- Directional signs.
- Location and width of aisleways.
- Stairways (risers, direction and border limit lines).
- Location of refuse cans.
- Drinking fountains and food dispensing equipment locations.
- Clear floor areas around first aid, fire fighting, or other emergency equipment.

QUESTION

6.15 OSHA SAFETY BLACK and WHITE are used to denote:

ANSWER

6.14

OSHA SAFETY PURPLE is used to denote radiation hazards.

REVIEW QUIZ OF OSHA SAFETY COLORS

QUESTIONS

6.16 List the OSHA safety colors used to denote:

Fire hazards and fire fighting equipment. _____

Danger or Stop. _____

Dangerous parts of machines, or energized equipment. _

Emphasize such hazards as removed equipment guards and open guard doors. _____

Caution, marking physical hazards such as: striking against, stumbling, falling, tripping, and “caught in between.” _____

Caution against the starting, use, or movement of equipment under repair. _____

Safety and first aid equipment. _____

Radiation hazards. _____

Traffic and housekeeping markings. _____

ANSWER

6.15

OSHA SAFETY BLACK and WHITE are used to denote traffic and housekeeping markings.

REVIEW QUIZ OF OSHA SAFETY COLORS

ANSWERS

6.16

The OSHA safety colors used to denote:

Fire hazards and fire fighting equipment. _____ Red

Danger or Stop. _____ Red

Dangerous parts of machines, or energized
equipment. _____ Orange

Emphasize such hazards as removed equipment guards
and open guard doors. _____ Orange

Caution, marking physical hazards such as: striking
against, stumbling, falling, tripping, and “caught in
between.” _____ Yellow

Caution against the starting, use, or movement of equip-
ment under repair. _____ Blue

Safety and first aid equipment. _____ Green

Radiation hazards. _____ Purple (with Yellow)

Traffic and housekeeping markings. _____ Black & White

PIPE IDENTIFICATION

An important safety factor in plant operation is the identification of the contents of piping by color bands and printed legend.

COLOR BANDS

Although some plants paint the full length of all piping with an identifying color, usually pipes are painted the same color as the adjoining wall or ceiling. This enables those portions identified by color and legend to stand out from the rest of the piping and surroundings.

The following OSHA SAFETY Color combinations are used in ANSI (American National Standards Institute) A13.1 latest revision to indicate the following:

- RED background with WHITE lettering:
Fire quenching materials such as water, foam, or CO₂.
- YELLOW background with BLACK lettering:
hazardous materials.
- PURPLE background with YELLOW lettering:
radiation hazards.
- GREEN/BLUE background with BLACK/WHITE lettering: low hazard materials.

QUESTION

6.17 List the OSHA SAFETY Color bands which indicate the following:

Fire quenching materials _____

Hazardous materials _____

Radiation hazards _____

Low hazard materials _____

STENCILED LABELS

Overhead piping should be banded in such a way that makes the legends visible from eye level.

Legends should be brief, informative and simple. They should be located close to valves and adjacent to changes in direction, branches, and where pipes pass through walls, ceilings, or floors. Direction of liquid flow should be shown with arrows. Valves, flanges, or couplings should be painted to identify contents. Sprinkler heads should never be painted.

ANSWER

6.17

Fire quenching materials:
RED background with
WHITE lettering:

Hazardous materials:
YELLOW background
with BLACK lettering.

Radiation hazards:
PURPLE background
with YELLOW
lettering.

Low hazard materials:
GREEN/BLUE
background with
BLACK/WHITE
lettering.

NO RESPONSE REQUIRED. PROCEED TO NEXT PAGE.

BENJAMIN MOORE'S COLOR PLANNING DEPARTMENT

In addition to producing high quality products and finishes, Benjamin Moore & Co. provides the PMI market with some of the finest professional design services and color merchandising tools available.

We offer the professional services of our Color Planning Department in assisting the PMI paint specifier with color. Benjamin Moore & Co. maintains a highly qualified color consultant staff at its Montvale and Chicago offices. They can help develop detailed color schemes for manufacturing plants, hospitals, office buildings, commercial buildings, factories, condominiums, housing developments, schools, hospitals, nursing homes, main street beautification, town revitalization, institutions, and other major construction. Arrangements for this complimentary service can be made through the Benjamin Moore Sales Representative or by contacting a Benjamin Moore office or dealer.

QUESTION

6.18 How can your customer arrange to utilize the services of the Color Planning Department?

HOW CAN THE COLOR PLANNING DEPARTMENT HELP DURING A PMI SALE?

The Color Planning Department is also responsible for answering dealer/consumer/Sales Representatives' questions concerning color; providing color stylings for internal offices and plants, and participating in professional, design related organizations.

Upon request, our specified colors will be coordinated with other unaffiliated products such as carpet, laminates, flooring, and window treatments for a total look.

This service is offered at no charge. It is appropriate to use the Color Planning Department when jobs are of substantial gallonage and it is helpful in promoting goodwill or exposure in the community.

Color styling may aid in securing a project, since it specifies a particular Benjamin Moore product, and it will not be translated into a competitor's line.

Please allow at least a 4-week lead time. This permits proper research in developing a well-conceived color plan, especially when materials from other companies must be coordinated.

QUESTION

6.19 The lead time required by the Color Planning Department is:

ANSWER

6.18

Your customer can arrange to utilize the services of the Color Planning Department through you, the Benjamin Moore Sales Representative, or by contacting a Benjamin Moore office or dealer.

INFORMATION REQUIRED FOR CREATING A COLOR PLAN

DESIGNATING PRODUCTS FROM LAYOUT AND CLIENT NEEDS

The Color Planning Department requires answers to questions such as:

- Are there existing products (flooring, carpet, drapes, roofing, tile) that must be matched or coordinated?
- Are there products (carpet, drape, tile, flooring, laminates, etc.) the owner desires to be suggested as a part of our color plan?
- In what product finishes should the specifications be written?
- Are there photographs, blueprints, elevations, or floor plans from which to work?
- Is the light exposure of particular concern (quite dark... especially bright... warm or cool artificial light)? Is there detailing to be “picked out”?
- Are there colors or a “look” particularly disliked or preferred? Determine this during your conversation with the client.
- Is there someone to whom Color Planning may speak directly for input (please include a telephone number)?

MAILING THE COLOR PLAN

The completed color plan will be mailed to the Sales Representative, dealer, paint contractor, or client, as requested.

Requesting this service is uncomplicated. After discussion with your District Sales Manager, contact Color Planning directly by phone. In this way the job can be explained, discussed, and an estimated date of completion established.

NO RESPONSE REQUIRED.

ANSWER

6.19

The lead time required by the Color Planning Department is at least four weeks.

The PMI Market

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Afterword

AFTERWORD

This manual attempts to present, in a single source, information gleaned from decades of the collective experience of many dedicated Benjamin Moore employees.

Its purpose is to provide the best information available; however it will only be as effective as you permit. Ultimately, your desire to continuously improve your PMI selling skills will determine your success. Therefore this manual offers you the challenge of continued self-development. We believe that there is no limit to the success that can be achieved with the dedicated, organized pursuit of the PMI market.

It is intended that this manual will undergo updating and revision. By doing so, it will remain a powerful developmental tool which will educate and inspire future generations of Benjamin Moore Sales Representatives.

You are invited to suggest additions, deletions, or changes in anything herein presented that will strengthen our penetration of the PMI market.

Please forward all of your ideas utilizing the *Marketing Info Message Form* to ensure that it will be reviewed.

Glossary

Certain words and terms used in this manual have specific meanings which may be different from their normal usage. Please study the terms presented here, and refer back to them if you have difficulty understanding them while reading the text. The following terms are used in this manual:

Account

An established customer in the PMI market on whom a dealer's salesperson or a Benjamin Moore Sales Representative may call in order to solicit business.

ANSI

American National Standards Institute.

Bid

A formal offer to sell products and services. A bid usually specifies quantity, price, delivery, application or installation (if applicable), and payment terms.

Open Bid

This is a situation in which any potential supplier may present a bid

Closed Bid

This is a situation in which each potential supplier may not bid unless invited to. Invitations to bid are sent to those suppliers on a Bid List maintained by the customer.

Total Bid

This is a situation in which the contract to supply a number of different products or services is awarded to a single supplier rather than to several.

Bid List

A list of approved suppliers, maintained by a firm or agency which awards business on a bid basis. In order to bid—to present a price for doing a job or supplying a product—one must be invited to bid. The firms on the bid list are those that are invited to bid.

Blitz

A pre-planned, concentrated effort by Benjamin Moore & Co. to raise the PMI market's awareness of Benjamin Moore products, and thereby stimulate business by acquiring new accounts for its dealers. Usually conducted within a single sales territory at one time, the blitz may cover the entire market or only a particular portion of it.

Commercial

Referring to a customer such as an apartment house, school, hotel, office, store, or hospital.

Contractor

A firm hired to by the owner of a facility to paint for them. Contractors may or may not specify the product they use, but they usually purchase it. While large firms constitute only one sixth of all firms in number, they buy about two thirds of all paint sold in the PMI market. For our purposes, we arbitrarily divide contractors into two categories:

Large Firms

Those with sales over \$250,000 annually.

Small Firms

Those with sales under \$250,000.

Industrial

Referring to a customer such as a factory or refinery, or to a specialty application such as exterior storage tanks where a special non-residential product would be appropriate.

Open Purchase Order

A purchase order which is not restricted to a particular list and quantity of materials. Usually an open purchase order is valid for a limited period of time, such as a month, and for a limited quantity or dollar amount. Its function is to allow departments of a large organization to purchase incidentals without going through the paperwork and delay associated with a major purchase.

OSHA

The Occupational Safety and Health Administration, a federal agency charged with creating and enforcing safety standards in the workplace. Created by the Occupational Safety and Health Act of 1971.

Painter Call Record

A form for writing down details about a sales call to a PMI prospect. A sample is included on page 36 of this manual, but you may wish to create your own.

PDCA

Painting and Decorating Contractors of America, a trade association.

PMI Market

Painter, Maintenance, Institutional market. That portion of the market where paint is sold to and applied by users other than retail consumers.

Prospect

A PMI firm that is not presently using Benjamin Moore products; the target of a blitz.

Purchasing Agent

The person whose responsibility it is to purchase paint or other products. Generally the purchasing agent does not choose what brand of paint to purchase; he is required to buy those products chosen by the specifier. The decision of where and from whom to purchase is that of the purchasing agent.

Residential

Referring to a single family or 2-4 family home.

Sales Representative

An employee of Benjamin Moore & Co. whose responsibilities include stimulating business in the PMI market as well as servicing Benjamin Moore's dealers.

Small Business Set Aside Program

A federal program designed to help smaller businesses compete in the marketplace. It requires that a certain portion of government contracts must be awarded to qualifying small businesses.

Specify

To decide what type and/or brand of paint, stain, or other coating should be used. This is as opposed to the purchasing decision, which is usually confined to deciding from whom the specified product will be bought.

Subcontractor

A contractor hired by another contractor to perform a portion or particular task involved in a larger project the contractor has been hired to perform. Generally a subcontractor is a specialist, doing painting, plumbing, or another specialized skill on behalf of a general contractor.

USDA

United States Department of Agriculture, which issues regulations regarding products used in foods or which may come into contact with foods during preparation. Paints used in a food preparation environment subject to federal regulations must be approved by the USDA. See the Maintenance Coatings Manual or the Specifications Manual for a list of USDA-approved Benjamin Moore products.