

# The Construction Specifier

SOLUTIONS FOR THE CONSTRUCTION INDUSTRY

## Specifiers and Product Representatives: Making the Most of the Partnership

by Michael D. Chambers

How many times have you heard the following from product representatives and specifiers?

*Why won't specifiers hold the specifications after all the sales time I spent?*

*I wish the reps would stop pushing me so hard, ease off the sales job, and help me with my specs.*

*Why can't I get an appointment with the architect? Why won't the architect return my phone calls?*

*I sure wish reps would provide me with information I could use in my project specifications.* Let us consider three integral aspects of product rep/ specifier relationships in designing and specifying construction products. First, what are the issues of mutual interest that bind us together? Second, what are specifiers' and product reps' self-interests? And third, what are the product reps' and specifiers' responsibilities to each other? If we, as an industry, can forge stronger working relationships, we will benefit significantly with more sales and better specifications. Let's also consider how specifier and product rep's relationships have evolved over the recent generation. If you believe in reverse evolution, it would be an appropriate description of their relationships, which have suffered tremendously at the hands of inexperienced and narrow sales and design management. From the industry side, the focus has been on providing the least number of reps possible; from the design side,

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the focus has been on refusing to include product reps and education time as billable.

The relationship between product reps and specifiers is crucial to increasing product sales and producing specifications reflecting true industry standards (not product features and benefits). While it may appear that there are more things separating us than bringing us together, product reps' and specifiers' strong mutual interests far outweigh their differences.

### **Competitive Specifications**

Although it may go against the grain of every sales rep's basic instincts, competitive specifications typically offer the best results for increasing sales and creating successful design. When a spec is written around clear industry standards and qualified manufacturers, everyone benefits. The owner gets the best price, the design professional's design intent remains intact, and the industry competitors can bid specifications that have competitive products. Any time you allow sole source or noncompetitive specifications, you are begging for substitutions.

### **Eliminate Substitutions**

Substitutions are the last thing reps or specifiers want to deal with. The best way to eliminate substitutions is to include competing manufacturers in the specifications. This requires that reps be knowledgeable about the competition and that the specifier understand how the industry works. It is clearly in everyone's interest to minimize substitutions. For the specifier, substitutions mean significant extra work, usually at the last minute, requiring decisions based on inadequate information and sales pitches. For the product rep, substitutions mean trying for last minute access to the specifier and typically competing on price alone rather than best application and support of the design. It is rare for a general contractor to consider a substitution unless there is a cost advantage. Of course, prebid substitutions are somewhat different, but the same principles apply. Product reps shouldn't wait until the last minute to get their products to specifiers. Their first response will usually be negative, and that is no way to begin a relationship.

### **Knowledge Management**

As projects get more complex and time frames for design and construction are compressed, the ability to find the right information quickly and completely are paramount. While a specifier, I often had four or more projects, each with at least 75

specification sections, underway at once. This translates into a lot of sections that must be reviewed, updated, modified, or developed from raw data. Specifiers have an incredible need for information to complete work, and reps have the data that needs to be communicated to the specifiers. Learning to manage and access knowledge is critical for both specifiers and product reps. No information—or, worse, incomplete information—means a specifier is at risk for conflicts or errors, and the product rep will not get its product specified appropriately. The management of knowledge and knowledge resources should be a critical interest for the specifier and product rep. The Internet will become a critical channel for knowledge management in the twenty-first century. Reps need to know where the information is and how to communicate it to specifiers. E-mail updates and specifier friendly Web sites are a great way to demonstrate a rep's knowledge management resources.

### **Networking**

A number of excellent but under-used networks exist to offer both product reps and specifiers opportunities to establish relationships supporting mutual interests. Relationships can substantially increase product reps' effectiveness in getting specified. Relationships are how most specifiers make difficult product decisions. Being active in CSI, AIA, and other industry associations can significantly increase the ability to develop mutually supportive relationships. While the current trend seems to suggest that investing time in associations is a low priority, the advent of continuing education and the crucial need to be specified to increase sales should cause everyone to reassess active membership in industry associations.

Actively participating in industry associations can have a positive impact on both sides of the professional relationship. I have found that product reps who are active members of CSI tend to be more sophisticated and knowledgeable about industry trends and processes. And active specifiers ask better questions and are more up-to-date on industry issues. The critical element here is industry expertise and how to communicate it. Industry associations, as networks and providers of education, are a resource for specifiers and product reps. Regarding networking, Mark R. Nelson, CSI, CDT, said, "about eight years ago, I started a manufacturer's rep firm with a waterproofing manufacturer as my main line. Over the first couple years, I was able to meet with all of the major specification writers in Chicago except one. That specification

writer was John Doe from XYZ & Associates. I could not figure out why he refused to meet with me to discuss my products. Finally, I discovered that he was very involved in the Chicago CSI chapter. So, I made sure I went to the next meeting. At the meeting, I introduced myself to him. He explained that his problems with my waterproofing stemmed from a terrible incident he had with the previous representative. After that incident he swore to himself that he would never use the product again. Nonetheless, after a few more discussions during subsequent CSI meetings, he invited me to come to his office to discuss waterproofing. Soon after, he was adding my product to his master specification. While CSI did not get my product specified, it did, through its meetings, provide a venue for me to get to know specification writers and for them to get to know me."

While it is clear that we have mutual needs, each one of us has strong self-interests that need to be understood. Our ability to recognize each other's self-interest is a significant step toward reversing the backwards evolutionary trend in specifier/product relationships.

Specifiers, as design professionals, need product data focusing on application and use as opposed to features and benefits. In 1984, McGraw-Hill surveyed design professionals to determine what they wanted from product reps.\* Ninety-two percent of them wanted product use and application; 88 percent wanted guide specifications; and less than 40 percent wanted company history, capacity, qualifications, and so forth. It is fascinating to note, in my experience, the first thing out of most reps' mouths is information about their company history, capacity, etc. Specifiers are tasked to produce specifications reflecting the design intent of a project in compliance with industry standards and practices. Additionally, specifiers want to be able to hold their specifications against substitutions diminishing quality or performance. The ability to accomplish this task relies on the specifiers' experience and knowledge resources. Specifiers also want to understand how products work or interface within an assembly. The use of three-dimensional samples is a tremendous benefit to specifiers trying to understand how things fit together. Relationships are a key need for specifiers. While many may not admit it, relationships are the basis for a significant amount of a specifier's decision-making process. While the review of technical information is critical, it is better to be able to make critical decisions based on data and industry expertise provided by the product rep. This is the heart of a

specifier's knowledge management tasks and a critical part of developing conflict-free specifications. Specifiers need product application data supported by industry expertise from product reps they can rely on.

Product representatives have specific needs relative to specifiers. As salespeople, they must demonstrate success to management. This means they must sell products to be used on projects. How do they accomplish this? They successfully do so by being able to bid competitive specifications with "apples for apples" requirements that don't require them to substitute or qualify their bids. This is a critical aspect of product reps' business which specifiers seem to least understand. Additionally, product reps need specifiers to hold their specifications against noncompetitive substitutions. Noncompetitive substitutions focus on cost (so-called "value engineering") or attempt to insert a superficially similar product of substandard performance and quality. Qualified leads and contacts are one of the strongest areas of complaint for reps in every corner of North America. Product reps need to meet with specifiers to do their jobs, and specifiers can't do their jobs without meeting product reps: so where is the problem? The lack of relationships is one, as is the significant lack of understanding of how each side must accomplish their individual missions. Remember, everything a rep does must lead to product sales. This doesn't mean specifiers should help; it means they should consider getting out of the way.

Needs are fine, and the better we understand each other, the more successful we can be. However, reps and specifiers must also take responsibility to understand needs and demand, from themselves and others, a higher standard of performance and relationships.

Specifiers must learn to listen and question. They must become knowledge managers, demanding information in a format they can use for projects and include in their specifications. Specifiers desperately need to understand industry issues and provide product reps with clear directions for their information needs. They cannot assume product reps and their manufacturers know how to operate and what they need to do their jobs. Manufacturers consistently make the mistake of thinking they understand what design professionals want; the surveys and flawed specifications show they clearly do not. Specifiers have a responsibility to help and advise product reps on what types of issues, information, and presentations they need to successfully execute their professional responsibilities. Specifiers need to make specifications the central

issue in how product information is delivered. They must demand specification competency from reps, raise the bar, and reward industry expertise with access and relationships. As appropriate, they must provide competitive intelligence to the product reps so they can better understand the pressures and demands on the specification development process. What about time constraints? They don't have time not to get the right information at the right time. Until specifiers clearly communicate their needs to the product rep management, they will continue to experience frustrations rampant in the current marketplace.

Product representatives have a significant, yet difficult, responsibility to provide specifiers with unbiased and impartial product information and to forget generic and nonproprietary information, reflecting not only industry standards but personal industry expertise. Specifiers understand product reps are selling products for a living, but they need to be able to explain product limitations and where a product fits in the competitive marketplace. If a product rep can rise above petty, competitive pressures from the sales side, they will be rewarded with specifier confidence and relationships, giving them a significant competitive edge over other reps. Reps must also demand specifiers ask better questions and not take glossy marketing slop as useful technical data. In my experience as a specifier and as a product rep, I have gotten the most help and impact out of simple technical pieces focusing on use and application, product limitations, and industry/competitive knowledge. Product reps must become educators to be effective with specifiers. They must learn how to educate specifiers using continuing education opportunities. Remember that even in education, relationships are key; successful education presentations are based on a face-to-face exchange of knowledge, not Powerpoint® or slick videos. Successful education experiences stem from the reps' abilities to personally communicate their industry expertise and willingness to make that expertise available as a design and specification resource. Reps and their manufacturers have a responsibility to educate specifiers about the realities of their industry and how to reflect that reality in specifications. Remember that specifiers are not stupid, only ignorant. Education can eliminate this ignorance.

Specifiers and product reps are joined at the hip of the design and construction industry, whether they like it or not. Cooperation based on clear understanding of mutual interests, and the willingness to take responsibility for developing that

understanding, can substantially change the current direction of product rep and specifier relationships. In my experience, the brightest moments have been when manufacturers, designers, product reps, and specifiers have combined their talents and industry expertise to solve design problems to everyone's benefit. Partnership and teamwork may be old fashioned terms, but they are indispensable in creating the built environment of the twenty-first century.

*\* In 1984, McGraw-Hill Sweets, as part of their Perspective Series, published "Catalog Perspective—A Manufacturer's Guide to Catalog/Binder Content, Distribution and Usage." The following is excerpted from a chart titled "Types of Product Information Needed by Construction Professionals." While this information is somewhat dated, it is certainly not out of date. It is interesting to note that this research came before the advent of the Internet and electronic media for product information.*

1. *Recommended uses and application of products (92 percent).*
2. *Guide specifications (88 percent).*
3. *Data on materials used in product finishes (78 percent).*
4. *Catalog table of contents (76 percent).*
5. *Codes/certification data (76 percent).*
6. *Guarantee/warranty data (73 percent).*
7. *Data on coatings/surfacings available or needed (69 percent).*
8. *Design criteria, formulas, and related literature (68 percent).*
9. *Major components/parts described in detail (67 percent).*
10. *Performance charts and graphs (66 percent).*
11. *Initial costs/price lists/price ranges (62 percent).*
12. *Steps, methods, and procedures involved in assembly/installation (59 percent).*
13. *Data on a product in its environment; product as part of larger assembly (54 percent).*
14. *Availability data (53 percent).*
15. *Inspection, servicing, repair, and replacement data "(47 percent).*
16. *Summary statement and a description regarding products in catalog (45 percent).*
17. *Life cycle costs (42 percent).*
18. *Manufacturer's history, experience, overall capacities, and range of products (40 percent).*

*One of the most common faults in selling relationships is that the product itself is the focus. When salespeople don't perform, maybe sales managers should tell them to get out of the product business and into the results business. Sell results, which are the point. Be specific regarding production, labor savings, and other benefits.*

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### **Additional Information**

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#### **Abstract**

Mutual interests, self-interests, and responsibilities to each other shape product rep/specifier relationships. The recent generation has seen the reverse evolution of these relationships, but these relationships are vital and can be effective with consideration of certain realities.

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## **Sidebar: Successful Long-term Relationships with Representatives**

**by David Altenhofen**

One core value my firm holds is that we do not pursue projects. Instead, we build relationships with clients. We strive to understand each others' values, business plans, and interests in order to develop a mutually fulfilling long-term relationship. I use these same ideals