

# THE RECORD

Published by the National Tooling and Machining Association

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Be Proactive. Get in Front of Your Sales & Marketing Plan – pp 22-23

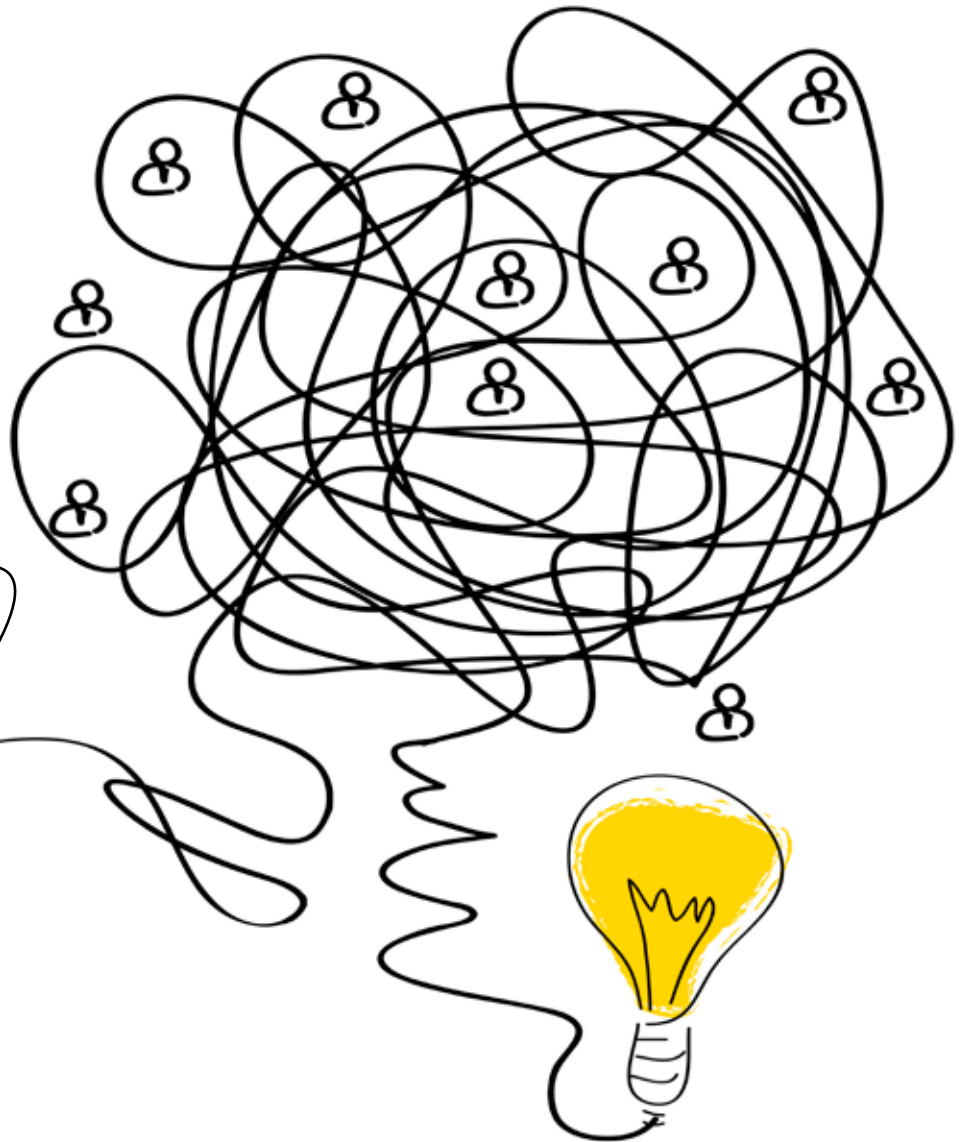
3 Things Manufacturers Can Do to Build a Marketing Presence and Drive RFQs – pp 24-25

*and so much more ...*

PRECISION MANUFACTURING  
**ENGAGE**  
SUMMIT WEST 2022 POWERED BY NTMA

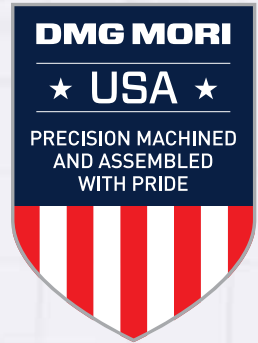
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## SALES & MARKETING, IS YOUR PLAN IN PLACE?



NHX with Linear Pallet Pool

# HIGH-PRECISION, HIGH-SPEED HORIZONTAL MACHINING WITH FLEXIBLE PALLET AUTOMATION



## Linear Pallet Pool

Maximize spindle up-time  
& unattended machining



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System Control



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## THE RECORD

### OPERATIONS & EDITORIAL

Roger Atkins, President  
Doug DeRose, Co-Editor  
John Stevens, Co-Editor

### ADVERTISING INQUIRIES

To advertise in The Record, or for information on publishing your corporate newsletter or sales literature, contact John Stevens at (216) 264-2837 or via email at [jstevens@ntma.org](mailto:jstevens@ntma.org) for advertising and editorial content.

### DESIGN & LAYOUT

Bluebird Branding  
[www.bluebirdbranding.com](http://www.bluebirdbranding.com)

### NTMA EXECUTIVE COMMITTEE

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## Upcoming NTMA National Events

PRECISION MANUFACTURING  
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### Engage Summit West

Monday, March 21 – Wednesday, March 23  
Costa Mesa, CA

PRECISION MANUFACTURING  
**ENGAGE**  
SUMMIT EAST 2022 POWERED BY NTMA

### Engage Summit East

Monday, June 6 – Wednesday, June 8  
Philadelphia, PA



### Emerging Leaders Conference

Monday, August 29 – Wednesday, August 31  
Indianapolis, IN

THE PRECISION MANUFACTURING CONFERENCE  
**ENGAGE**  
2022 POWERED BY NTMA

### Manufacturing Engage 2022

Tuesday, October 25 – Friday, October 28  
Kansas City, MO

## What's Your Story?

### Send Us Your Story

Each issue of The Record will feature stories from members – and we want to hear from you. Send us stories of success, or those that fit the theme of the month's issue. The submission deadline is the first of the month prior to publication.

Contact Carrie Marsico at [cmarsico@ntma.org](mailto:cmarsico@ntma.org)

### Upcoming Themes for The Record

#### April

Certifications & Compliance...Keys for the Future

#### May

Advocacy...Pay or Play?



# PRESIDENT'S UPDATE

By the time you read this article, we will have already completed 1/6th of the 2022 new year. This month our focus is: "Sales & Marketing... Is your plan in place?" Why are we asking, "Is your plan in place?" – because doing it the same old way is no longer good enough. So again I ask you, do you have a new or revised plan in place, and are you executing that plan? The pandemic changed many things for our industry, but none greater than how we as small-to medium-sized manufacturers go to market. We can no longer depend on word of mouth, current customers, and minimal advertising exposure to meet our needs. It's not the lack of volume promoting your company that is the issue, but rather, getting the right information, to the right people, via the right communication method. Never in recent years has our need to change our sales process, both via personal and advertising communications, been more critical.

So, as a result of this pandemic, what has hastened our need to change? First, personal communications and visits: the pandemic immediately stopped customer visits, both at the customer's site and at your site. Second, the people we dealt with on a daily basis are no longer housed in one customer location, with many now located remotely all over the country. This broke the customer's internal procurement team strategy – with a change of focus on individuals rather than teams, it has become harder for those on both sides, customers and suppliers, to develop and depend on relationships. Third, the ability to get your company name, capabilities, and services in front of new customers given existing challenges with

visits, procurement, the move to remove, as well as a lack of awareness of where the opportunities for new business may exist.

There is good news! Business is picking up for the OEM's, and, therefore, the need for suppliers. Also, the supply chain issues have again caused US OEMs to shift their focus and considerations to reshoring/ onshoring to US manufacturers who are closer to point of use. The reality is that the manufacturing pool has contracted as a result of the pandemic, and there are now more opportunities to be picked up amongst our companies. That being said, the question is, have you changed your sales strategy, and do you have your "plan in place" to capitalize on the current or impending opportunities?

## What are some of our options going forward?

- Is the day of sales person gone? No, but using them effectively must be part of your strategy. Ongoing accounts where you have developed that face-to-face interaction will most likely stay intact, making your sales folks critical to maintaining and growing those accounts.
- As trade shows begin to resurface, we must determine if they are still an effective way to promote our capabilities and services to new opportunities. Personally, I believe they will continue to serve an important role in connecting customers and suppliers.

- Regardless of what your overall strategy is, it must include an up to date, outward facing, and interactive website to tell your story and clearly articulate your capabilities and services. They can no longer have outdated materials, articles, or machine lists.
- Being that the pandemic drove both customers and suppliers to utilize the internet more and more, a sales plan today must include a social media aspect in its strategy. The procurement and supplier development communities of our customers are no longer product part experts, but rather, procurement experts looking to identify new shops based on social media posts, websites, certifications, and shop photos and videos showing the shop's commitment to organization, cleanliness, capabilities, and services. This leaves you with little to no opportunity to verbally sell yourself, your company, and build those personal relationships that many of our companies were founded upon.

## We must do all that, just to get an opportunity for new business.

Whereas I believe much of what I have written above to be true and accurate, it is not intended to say that if you are not looking and changing in those areas mentioned, you are "done". Rather, my intent is to challenge you to change and re-strategize – to consider the options given, and see how you might

incorporate one or two into your sales plan. I share these thoughts from the perspective of someone who has been responsible for shop sales my entire career. Trust me, I have seen and experienced many changes in the sales process and have struggled like many of you to understand how to incorporate them all.

As President of NTMA, I have taken much of my experience and tried to share it in hopes of helping you, our members. In addition to my personal experiences – good and bad – our NTMA national team has searched for industry partners that are experts in this ever-changing “sales process” that, if needed, can help you and your businesses. These are companies we have vetted out, that currently and successfully serve some of your fellow NTMA members, and were created to address specific needs within small-to medium-sized manufacturers. I am listing them here in the event that you think they might help support your business, and I personally endorse them all.

**Factur** – Lead generation company; making on-going calls for new business on your behalf while you are working “On” and “In” the business. *CONTACT: Gabe Draper, gabe@bethefactor.com.*

**Paperless Parts** – Estimating and quoting software, streamlining your upfront processes; allowing shops to react faster and more accurately to customer opportunities. *CONTACT: Jason Ray, jason@paperlessparts.com*

**Paperless Parts Marketing** – Managing and sustaining your company’s entire social media platform and posting. *CONTACT: Matt Sordillo, matt@paperlessparts.com*

**EBITDA Growth Systems** – Helping you focus your organization’s management, operations, finance, and executive leadership to enhance your company’s performance. *CONTACT: Dave Capkowitz, dave@ebitdagrowthsystems.com*

**Core Solutions** – Focusing on company certifications including CMMC, required by industry and possibly new customers. *CONTACT: Kevin Metz, kevin.metz@thecoresolution.com*

In closing, you might note I have mentioned nothing about quality, price, and delivery in your “sales plan.” Today these are no longer an option – they are a GIVEN, and it is key to make sure it is a GIVEN in your company. I believe using these strategies and/or industry partners will allow you to answer the question “Is your sales plan in place?” with an affirmative “YES.”

Let’s grow our companies and our association, and remember for us small-to medium-sized US manufacturers:

**“There is Strength in Numbers.”**



Roger Atkins, President – NTMA

## One Voice: Federal Government Advocacy Program

As US manufacturing continues to navigate the unique challenges and changes brought on by the last year – and a change in Administrations – it remains important to have a partner in advocacy. NTMA helps provide this support by working closely with the team at One Voice: the combined federal government advocacy program representing small and medium-sized business manufacturing in America.

With regulations, policy, and shop safety all constantly evolving, One Voice has a wealth of fantastic resources, developed to help keep your shop informed and prepared for whatever comes next. In addition to ongoing COVID-19 response information – in line with any and all changes

that our industry may need to know – the team at One Voice also provides informative policy webinars, news releases, educational materials, video recaps, and much more.

Don’t forget about the Talking With One Voice podcast – every episode, the One Voice advocacy team breaks down how the latest news from Washington impacts manufacturing businesses across the country. It’s yet another way your shop can get quick, concise information on everything from tax development to loans and even workforce development issues. You can send in your key questions to be answered by emailing [onevoice@policyres.com](mailto:onevoice@policyres.com).

We hope you continue to utilize this key partner in One Voice – one that ensures that millions of manufacturers across the country have their voices heard.

Please visit [www.metalworkingadvocate.org](http://www.metalworkingadvocate.org) for more information.





**CGTECH**  
**VERICUT**

N5760M1  
(TOOL - 4 DIA. OFF. - 4 LEN.)  
(Center drill .500 holes - A0)  
N9520M6  
N9525T5  
N9530G0G90A0.S5000M3  
N9535G54X-4.8Y-2.  
N9540G43H421.M8  
N9550G98G81Z-2.77R-2.42F100.  
N9560X0.Y-2.  
N9570X4.8753Y-2.  
N9580Y2.  
N9590X0.Y2.  
N9600X-4.8Y2.  
N9610X0.Y0.Z-2.02R-1.67  
N9620G80  
N9630M5  
N9640G49G91G28Z0.M9  
N9650G28X0.Y0.A0.  
N9660M01  
(TOOL - 5 DIA. OFF. - 5 LEN.)  
(Drill .500 holes - A0)  
N9670M6  
N9675T6  
N9680G0G90A0.S5000M3  
N9685G54X-4.8Y-2.  
N9690G43H521.M8  
N9700G98G81Z-3.3R-2.42F60.  
N9710X0.Y-2.  
N9720X4.8753Y-2.  
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N9740X0.Y2.

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# New Member Highlights

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[www.carrlane.com](http://www.carrlane.com)

**G H CUTTER SERVICES, INC.**  
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Here at GH Cutter Services we offer affordable costs with detailed and experienced machinists. Our Company started in 1988 and has been growing adding and creating new ideas. We opened a new line for designing and building gauges in 1994. Our gauges are used by several plastic bottle manufacturers in the USA. We are also a manufacturer for fixtures by machining specialists.

6203 N. Detroit Ave., Toledo, OH 43612  
(419) 476-0476  
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**WURTEC**  
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Wurtec was founded by Steve Wurth in 1985. Our core business is designing/manufacturing special tools, fixtures, and component parts for the commercial elevator and escalator industry. We currently have about 100-120 employees worldwide. We are headquartered in Toledo with branch locations in New York City, Las Vegas, Miami, Dallas, Vancouver, and Toronto, and manufacturing in Shanghai, China.

6200 Brent Drive, Toledo, OH 43611  
419.726.1066  
[www.wurtec.com](http://www.wurtec.com)

**SALT LAKE COMMUNITY COLLEGE**  
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Salt Lake Community College is Utah's largest college with the most diverse student body. It serves more than 60,000 students on 10 campuses and with online classes. All ages. Many interests. Flexible scheduling. With an exceptional range of academic and career-oriented options. A superb faculty—and a faculty-to-student ratio of 1:20—means our students get personal attention from exceptional academic and vocational professionals.

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[www.slcc.edu](http://www.slcc.edu)

**SENDCUTSEND**  
Western At Large Member



SendCutSend is a high-tech, cloud-based manufacturing company specializing in the precision cutting of a variety of metals and aerospace materials. SendCutSend was founded in 2018 by CEO, Jim Belosic, an avid hobbyist and fabricator. Belosic often found himself in need of specialized parts in small quantities to create his projects, only to be frustrated by vendors only willing to supply large and costly orders. Belosic saw an opportunity to create an online solution, combining the convenience of e-commerce, and the efficiency of cloud-based manufacturing.

4835 Longley Lane, Reno, NV 89502  
(775) 683-9499  
[www.sendcutsend.com](http://www.sendcutsend.com)

**SMITH AND COMPANY, LLC**  
Southern At Large Member



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# Don't Let Good Get in the Way of Great

By: Michael Watkins, MBA/JD, EBITDA Growth Systems

At a recent NTMA event in Savannah, Georgia, I had the honor of telling a story about my daughter. Jessica is a NASA astronaut who is headed to the international space in April for a six-month mission. I was a little reluctant to share because I am certain that Jessica would say that it is not all about her, but rather that it is all about the mission. I shared the following story, nonetheless.

Jessica expressed an interest in becoming an astronaut after visiting the Air & Space Museum in Washington, DC, and participating in an after-school enrichment program at the Judith A. Resnik Elementary School in Gaithersburg, Maryland, named for the second American woman in space, who died in the 1986 Challenger disaster. Of course, my wife and I encouraged her and told her that in American you can be whatever you want to be. We didn't realize it then, but her mind was set at that early age to pursue that dream.

## FORTUNE FAVORS THE BOLD

Jessica completed her undergraduate studies at Stanford University, where she was an All-American rugby player and scored on the last play in the 2008 NCAA national title match to stun Penn State 15-10. In her Junior year at Stanford, she was the leading try scorer for the US National (Eagles) team in the 2009 Rugby 7's World Cup in Dubai, where the surprising US women lost in the semifinals to New Zealand.

While Jessica was working on her doctorate at UCLA, she learned that Rugby 7's would be played for the first time at the 2016 Summer Olympics in Rio. The lure of becoming an Olympian was too strong to resist, so she made the weekly trek to the US Olympic Training Center in Chula Vista (San Diego) to try to earn a spot on the team. After a few months, she asked the coach for a contract so that she could suspend her studies and train fulltime with the team, but he was unwilling to commit. Reluctantly, she decided to abandon those pursuits and continue with her studies.

## HOW FAR YOU GO DEPENDS UPON HOW FAR YOU GO

Shortly after Jessica had moved on, she received a call from her World Cup coach asking her to return to the training center full time. Apparently, the former coach had been let go and the US Olympic committee had brought back the World Cup coach to lead the USA women's team. Jessica's response was truly inspirational to me. Basically, she felt that "it would be really good to become an Olympian, but that it would be great to become an Astronaut," and so she passed on the opportunity to join the USA Olympic team.

The key point here is that the odds of Jessica becoming an Astronaut at that point were extremely low (in her 2017 class, there were 18,300 applicants and only 12 were selected). The sure thing – becoming an Olympian – was the "good thing"; the unlikely thing – becoming an Astronaut – was the "great thing." Jessica chose the unlikely great thing.



There is an ancient Latin proverb that reads "fortune favors the bold." Certainly, this was true for Jessica. But what about for the rest of us? For the rest of us, I think the lesson to be learned is that it is quite possible that things may turn out far better than we could imagine, but we will not know unless we put ourselves out there and get after it. My favorite saying now is – "how far you go depends upon how far you go." The question becomes, how far will you go in order to experience the possibility of things turning out far better than you could imagine?

**This is America after all.**

**EBITDA**  
GROWTH SYSTEMS

*Michael Watkins is Principal and Owner of NTMA Affinity Partner EBITDA Growth Systems – you can find out more about EBITDA at: [www.ebitdagrowthsystems.com](http://www.ebitdagrowthsystems.com).*

## CFB Completes Investment in Patterson Mold and Tool, LLC



Capital For Business, Inc.® (CFB) is pleased to announce that it recently completed an investment in NTMA Member Patterson Mold and Tool, LLC (Patterson). Based in St. Charles, Missouri, Patterson is a designer and manufacturer of complex tooling used in the die casting industry. Patterson provides engineering support and collaborates with die casting providers and their end customers, from prototype development to production tooling, and provides tool and die repair and refurbishment services. In addition, Patterson utilizes its machining expertise to manufacture precision metal components and assemblies for diverse end markets including aerospace and communications.

“We are extremely excited about our next phase of growth in partnership with an experienced ownership group led by CFB,” said Tim Gehrs, President of Patterson. “We will continue to invest in our team and capabilities to serve a growing customer base with the highest levels of quality and service.” Affiliates of CFB, Millstone Capital Advisors, LLC (Millstone Capital) and Konza Valley Capital, Inc. (KVCI) provided subordinated debt and equity to complete the transaction. The entire Patterson management and production teams will remain with the company. CFB Senior Vice President Chris Redmond offered, “We are excited to partner with Millstone Capital, KVCI, and the entire Patterson team to expand upon the company’s history of success.

We believe that Patterson’s deep engineering and manufacturing expertise, and demanding end markets where quality and complexity are clear differentiators is a winning combination.”

**About CFB:**

*CFB is a St. Louis–based private investment firm, owned by Commerce Bancshares, Inc., providing capital to middle-market businesses with proven management teams and a high potential for growth. Founded in 1959, CFB is one of the oldest Small Business Investment Companies (SBICs) in the nation and is focused on control buyouts of value-added manufacturing, distribution, and business services companies throughout the US.*

## Empowering NTMA Chapters – Recapping Chapter Leadership Summit 2022

Chapter Leadership Summit in Savannah, GA, was a great success! January 30th -February 1st, over 50 attendees came together to strengthen their knowledge of the NTMA’s goals and mission. CLS 2022 kicked-off on Sunday evening with our welcoming reception held on the beautiful Terrace of the Andaz Hotel. Guests had the opportunity to network and meet new faces. The following morning, we began a full day of content with a warm welcome from the NTMA President, Roger Atkins. He discussed where the association is headed in 2022 and what the focus is for the upcoming year.

Highlights of CLS 2022 included NTMA initiatives, growth workshops, roundtables, Q&A sessions, panels, and exciting social events. Lowelle Applebaum did a great job moderating, as well as leading two sessions – one on Membership Retention and Recruitment and another for our final session, tying everything from this year’s together. Anne Marie Tracy from Paperless Parts got everyone excited and aware of social media marketing practices. Everyone left ready to “like” and “share” content.

Paul Schindel, Chapter Executive (CE) for the NJPA-NTMA Chapter said, “It was great to meet many of the key players from National. The timing could not have been better as I ramp up in the CE role with the NJPA Chapter. While I’ve worked with manufacturing companies, and managed associations and not-for-profits for many decades, each is different and CLS 2022 was a valuable ‘view from 10,000’ feet of the roles and interplay of National and Chapters. Especially valuable for me was spending time with the other CEs in attendance, who ‘are there, doing that.’ What a great group of professionals!”

Barbe Bennett, Chapter Executive from the Arizona Chapter said, “I just wanted to thank all of you for putting on such a great CLS Conference – my head is swimming with new ideas to implement within the Arizona Chapter!” Together with our chapter leaders, employees, and partners, we were able to come together at CLS 2022 to build on NTMA’s values by taking a look forward into what the future will hold for us. Learning, growing, and understanding the value in



partnering between National and Chapters empowers us all to provide the best service to our members! The future is bright.

**A special thank you to our sponsors for CLS 2022: APPI, Fatur, Grainger, Paperless Parts, EBITDA Growth Systems, and PartnerShip!**

# Inspire Students to Pursue Pathways to Careers in Manufacturing



Do you know a driven, resourceful, and innovative student in the US looking to explore a post-secondary educational pathway to a successful career in manufacturing?

If yes, the National Tooling & Machining Foundation Scholarship awards scholarships up to \$2500 to graduating high school seniors, undergraduates, and graduate students pursuing two-year, four-year, or advanced degrees in manufacturing.

Manufacture their future and encourage them to apply for an NTMF scholarship by April 15, 2022. Information about the scholarship program, along with the link to the online application form, is available at: <https://form.jotform.com/BPadnos/ntmf22scholarapp>.

A recommendation by an NTMA Member in good standing is required for each student applicant.

For more information or questions, contact Bill Padnos – [bpadnos@ntma.org](mailto:bpadnos@ntma.org)



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**Contact Kristen Hrusch for more information: [khrusch@ntma.org](mailto:khrusch@ntma.org)**

# PRECISION MANUFACTURING ENGAGE SUMMIT WEST 2022

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## STRATEGIZE AND REVITALIZE

March 21 - March 23  
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(714) 751-5100 and refer to Engage Summit West.

**The deadline to lock in your room rate is:  
February 28, 2022**

**Opening Keynote:**

*Will 2022 Be the Year That Things  
Get Back To Normal?*

**Presented by: Chris Chidzik,  
Research and Survey Manager for AMT**



Chris Chidzik, Research and Survey Manager for AMT, will reveal the present state of manufacturing using Gardner's proprietary Business Index along with macroeconomic research.

This presentation will further discuss the nexus of supply chains, production, and employment. It will also explore the state of the consumer nearly 1-year after the end of the paycheck protection plan which boosted disposable income and sent demand for durable goods soaring in 2021.

Chris' presentation will provide attendees with a clear picture of today's metalworking manufacturing landscape, actionable insights, and practical resources (some even freely available) that you can use to monitor changing business conditions for yourself.

**Closing Keynote**

*Manufacturing Marketing in  
the Modern Age*

**Presented by: Shawn Fitzgerald  
President, Thomas - A Xometry Company**



As technology has changed the way precision manufacturing shops do business, so too has it changed the way shops are able to get in front of potential customers and clients. Marketing in the digital space is ever-evolving, and manufacturing professionals have to stay on top of trends and best practices to keep their own businesses moving. Join Shawn Fitzgerald of Xometry as he provides a data-driven crash course on digital marketing, framed to our industry, including:

- Gaining exclusive insights on national and regional trends based on sourcing activity from the Thomasnet.com platform
- Understanding how to adapt to the digital transformation happening in industrial sales and marketing
- Learning about today's digital marketing best practices and free tools to get started

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## GENERAL SESSIONS

### General Session 1

#### The Reshoring Surge – Learn the Benefits for Your Shop

Presented by: Harry Moser – Founder & President, Reshoring Initiative



Reshoring is surging nationally. For decades, we lost 10,000s of business and millions of jobs to offshoring. It is now clear that shorter supply chains are lower risk and are more profitable for OEMs for 20-30% of products that are now imported. Over 1 million jobs have been announced and reshored since 2010. Find how to benefit from the trend. Takeaways include:

- Identify the products most eligible to reshore
- Quantify the costs and risks of offshoring
- Find companies that import what you make
- Convince companies to reshore and buy from you

### General Session 2

#### The Government is Your Business: An Update from Washington D.C.

Presented by – Omar Nashashibi – Owner & Founding Partner, The Franklin Partnership  
Caitlin Sickles – Director, Policy Resolution Group at Bracewell LLP



In the two years since the rise of the pandemic in the US manufacturers continue to see first-hand the level of government involvement in their business. The Franklin Partnership and Policy Resolution Group at Bracewell will discuss how the latest policies and actions from Washington, D.C. affect your company. From taxes, tariffs, and OSHA mandates to supply chain and worker disruptions, Caitlin Sickles and Omar Nashashibi will provide an update from the nation's capital, what to expect from policymakers in 2022, and how the election season may alter the government's direction.

### General Session 3

#### Industry Roundtable Sessions

Moderated by – Caitlin Sickles – Director, Policy Resolution Group at Bracewell LLP



Join Caitlin Sickles for industry-driven roundtable discussions on some of the biggest issues facing your shop today. Connect with your peers, ask pressing questions, and discover solutions to help keep your business thriving.

### General Session 4

#### Best Practices for Implementing Automation – A Member Panel

Moderated by: Stu Shepherd, Vertical Development Director, Americas, Universal Robot



With demand increasing, automation is becoming more of a necessity rather than a luxury. Gain more insight into all the different ways to automate. Leverage benefits that will give you a competitive advantage. Lower your operating costs, increase workplace safety, increase productivity and create better product quality. Hear from NTMA members as they discuss the steps they took to implement automation and the benefits they've generated.

## BREAKOUT SESSIONS

### Learning, Leading and Communicating – How to Understand and Explain Difficult Issues

Presented by: Omar Nashashibi – Owner & Founding Partner, The Franklin Partnership

### Fundamentals of Job Costing

Presented by: Dave Capkowitz – Principal, EBITDA Growth Systems  
Mike Watkins – Principal, EBITDA Growth Systems

### Optimize Your Manufacturing Process With a Complete Digital Twin

Presented by: Jim Huddy – National Sales Manager, CGTech Vericut

### Building a Sales Culture

Presented by: Gabe Draper – Chief Prospecting Officer & Co-Founder, FACTUR

### Expanding & Diversifying Your Shop's Talent Pipeline

Moderated by: Bill Padnos – NTMF & AMPED Director, NTMA

### Using Software Tools to Keep Up With Increasing Demand

Presented by: Paul Van Metre – Co-Founder, ProShop ERP

### Succession Planning – First Steps, Next Steps, and Everything In-Between

Presented by: Troy Roberts – CEO, Beanstalk CCW, LLC

## PLANT TOURS

- Moseys' Production Machinists
- Ricourte Precision



Opening Keynote will start Monday, 3/21 at 4pm and Closing Keynote will wrap up Wednesday, 3/23 at noon

Questions? Contact Kristen Hrusch  
khrusch@ntma.org or 216-264-2845

## Levels of Engagement



**Flyover**

Financial, equipment or other types of donations



**Technical Support**

Technical advice and assistance



**Boots on the Ground**

Face to face interaction with students and teachers

# Strategies for Building the Next Generation of Talent

By: Jennifer Edge, Ford Next Generation Learning

Last month, we (Ford Next Generation Learning) wrote about how you can prepare the workforce of tomorrow, today by engaging directly with career and technical education (CTE) pathway programs composed of high school students. To do so effectively requires the right staff, the right structures, and the right mindset. When you combine those key elements, you are well on the way to bridging the divide between the worlds of education and work. Building that bridge matters for the future of your industry, and it has everything to do with how effectively your company engages with students and their teachers. If you haven't read last month's article, check it out. This month's article focuses on how organizations like yours can actively engage and partner with education, specifically secondary CTE pathway programs. Active engagement and strong partnerships go a long way to ensuring a strong talent pipeline of interested and skilled, young professionals. We will look at essential strategies as applied by some of the most powerful partnerships.

### Let's begin by looking at the three ways employers typically engage with education. They include:

Many of the employers active in the third category (boots on the ground) see their engagement with students and teachers, not only as giving back or good citizenship but as true stakeholders in the future success of their workforce and their community at large. Your partnership goal is to become a true "stakeholder," so the impact on your organization and industry is deep and real. So, for an organization to move closer to that "stakeholder" role, we typically see them employ five key strategies. Application of most, if not all, of the strategies, is evident in the more developed and productive employer/education partnerships. We call these highly engaged and mutually beneficial relationships "powerful partnerships."

### Organizations aspiring to become true stakeholders and build powerful partnerships:

#### 1. Demonstrate broad organizational awareness, interest, and support.

- Volunteer for a classroom talk.
- Participate in a panel or roundtable discussion with teachers.

- Serve on CTE advisory boards.
- Serve as career mentors to students.
- Coach teachers in developing general skills and practices as applied in your world of work.

#### 2. Engage with students and teachers at their schools and in their classrooms.

- Volunteer for classroom talks to help connect teaching and your company.
- Participate in a panel or roundtable discussion with teachers.
- Serve on CTE advisory boards.
- Serve as career mentors to students.
- Coach teachers in developing general skills and practices as applied in your world of work.

#### 3. Host and engage with teachers and students on-site.

- Build the company's capacity to host successful on-site activities like a worksite tour.
- Host worksite tours and briefings for teachers and/or students.
- Provide job/department shadowing opportunities for teachers and students.
- Host a team of teachers from the same career and technical education pathway/academy for an on-site externship.

#### 4. Sustain ongoing organizational commitment and prioritization.

- Ready the culture, systems, and structures of employer organizations to effectively engage in powerful partnerships with students and teachers.
- Conduct periodic briefings with the company's leaders and management on the status and results of the partnership with the school(s).
- Establish dedicated staff, such as a consistent point of contact for ongoing planning and support coordination. (Sometimes we call this role the "employer partnership manager.")
- Provide accessible training and development for teachers and students.
- Identify and manage a resource pool of dedicated staff (i.e., volunteers) seeking

opportunities for engagement with teachers and students based on the company's vision for educational partnerships.

#### 5. Advocate for education and workforce solutions in their community.

- Serve as an advocate on workforce development councils and other forums focused on education reform and workforce development.

Please note that the strategies listed are not in a particular order. The list is intended to help you reflect on your organization's approach to partnerships. Consider what is relevant and/or already in place and how effectively your strategies are working. Our aim here is for your organization to better understand the reasoning for partnerships and to help you plan for greater levels of effectiveness. It is also to encourage a continuous improvement mindset so that your company's overall workforce and future talent strategy intensify its involvement with education as a core partner in a sustainable way.

We hope you find this month's issue helpful as you analyze your current engagement and consider ways of applying the five key strategies. Don't miss our next issue as we explore the best engagement structures for employer organizations to establish. Begin the transformation today! Ready the culture, systems, and structures of your company to effectively engage in powerful partnerships and create the workforce of tomorrow. All you need is a blueprint for Powerful Partnerships.



For more information about Ford NGL or to obtain a copy of a complete chart containing the five strategies, the examples, and further descriptions with objectives to share with your constituents, please contact Jenn Edge at: [jedge@fordngl.com](mailto:jedge@fordngl.com).

## The NTMA would like to recognize all of the graduates of the entire NTMA-U program in 2021!

The NTMA would like to recognize all of the graduates of the entire NTMA-U program in 2021! There were 25 graduates from 19 different member companies, joining the ranks of 189 previous graduates since the first graduating class in 2014. All of these individuals completed the over 700 hours of learning, across key competencies in the precision machining field.

Please consider signing up for the NTMA-U online program to build the fundamental skills for your machinists that will create a solid foundation for your company. Check out [www.ampedmfg.org](http://www.ampedmfg.org) for more information, or contact Alice Overton, NTMA-U Program Coordinator, at [aoverton@ntma.org](mailto:aoverton@ntma.org).

**Thank you to the following member companies that invested in their workforce and supported the 2021 NTMA-U graduates:**

<i>BCI</i>	<i>Patterson Mold</i>
<i>Blue Origin</i>	<i>PHB Inc.</i>
<i>Cepheid Moldmaker</i>	<i>Quadra Tooling</i>
<i>Gaum Inc.</i>	<i>Rexair LLC</i>
<i>Gibbs</i>	<i>Starn Tool &amp; Manufacturing</i>
<i>Idex</i>	<i>Value Tool</i>
<i>Indiana Tool &amp; Die</i>	<i>W.L. Gore</i>
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<i>Leech Industries Inc.</i>	<i>Win-Tech Inc.</i>
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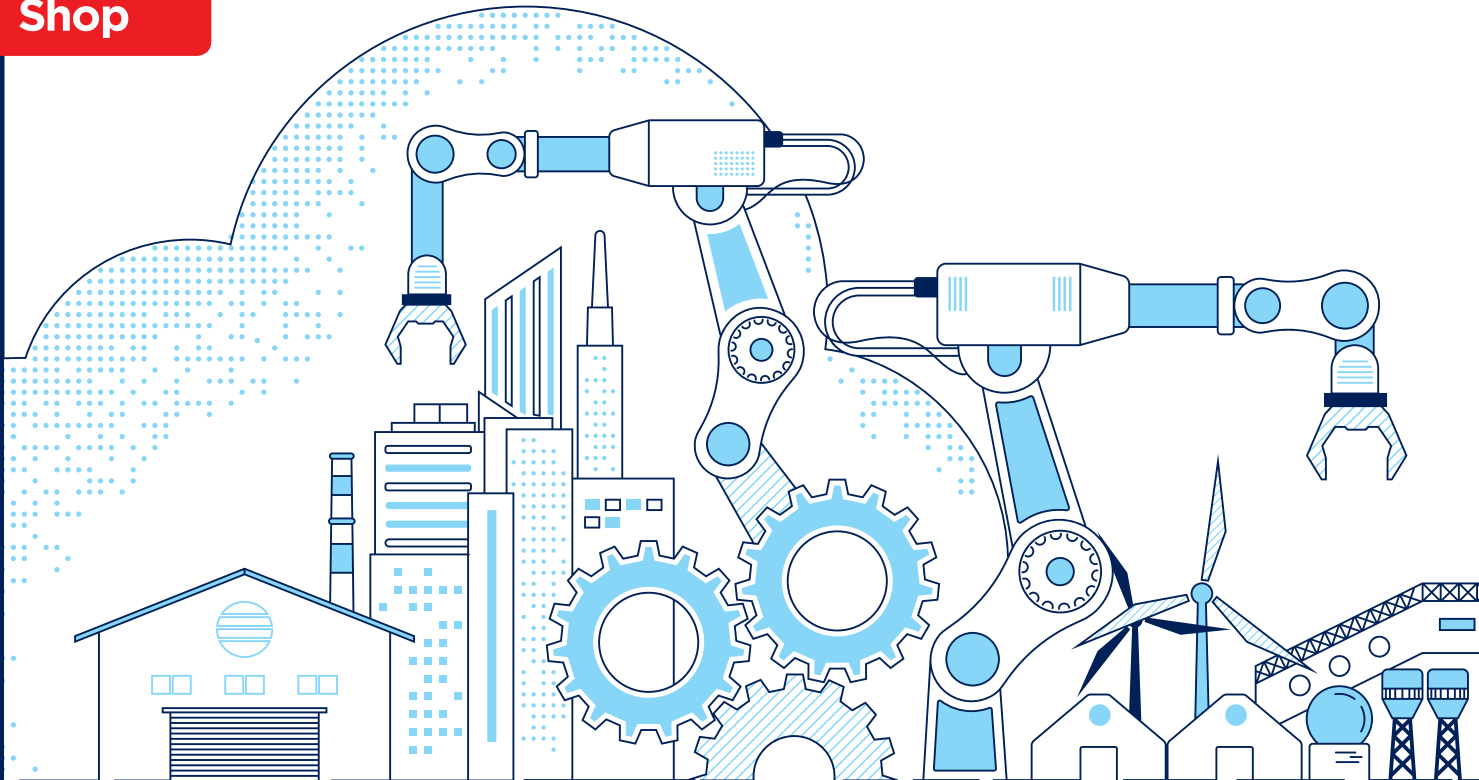
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# Emerging Leaders Rising 2022 Class Nominations – Now Open



We are now taking nominations for the EL Rising Class of 2022! Managers and supervisors of these young, talented, and emerging manufacturing professionals, submit your nominations today!

We will be selecting up to 15 individuals for this prestigious award. The selected individuals will be recognized in the July issue of The Record, with their photos, professional information, and accomplishments. Individuals selected for the EL Rising Class of 2022 will be invited to attend the Engage 2022 at a special rate and will be recognized on stage during the awards ceremony. This will offer them an opportunity to connect with one another,

gain valuable recognition, and develop their skills and knowledge. They will also be invited to attend the 2022 Emerging Leaders Conference, where they can continue to grow and learn in this great profession.

As a leader for your company who is focused on the future, you have already identified your future leaders. Now you need to make sure they are being recognized for their work and accomplishments. Please do not hesitate, enter your outstanding emerging leaders today!

Nominations for EL Rising Class of 2022 are open to all regular members, including our National Associates.

## The Process to Nominate Is Simple

Email Kristen Hrusch (khrusch@ntma.org) with the following information by May 31, 2022.

- Name of nominee
- Company name
- Contact information for nominee
- Achievements and contributions
- Any additional information that is pertinent

The group will be notified by the second week of June, in order to obtain more details for the July issue of The Record.

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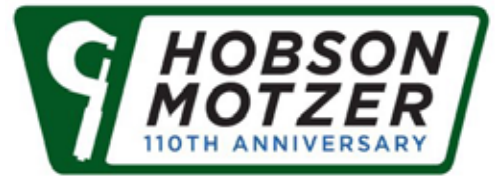
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## Hobson & Motzer: In Pursuit of Excellence for 110 Years

Longevity in any business can be challenging. In the manufacturing world, the ability to survive – and thrive – over the long term is especially noteworthy. Manufacturing jobs have been declining since 1979 when the US reached an all-time high of 19.6 million jobs. By 2019, this number was down to 12.8 million, a 35% decrease. Environmental factors, automation, and companies moving jobs overseas have all contributed to this downturn.

Over the years, the company's expertise has grown considerably, as innovative new materials and technologies, capabilities, and manufacturing processes are added to their portfolio.

In the 1950s, A.E. Motzer, who succeeded his father in ownership, implemented a "Pursuit of Excellence Strategy" which has guided the company to this day. Metal stamping was introduced in the late 1960s, and



and ideally suited to take on bigger and more complex projects, especially within the medical device sector." Hobson & Motzer's mastery of components used in surgical stapling technology has fueled enormous growth for the company. While manufacturing employment dropped precipitously in the US between 1979 and the present day, Hobson & Motzer's workforce increased twentyfold during this same period!

### A Dedicated Workforce

Today, the company has just under 400 team members, a far cry from its beginnings as a two-man shop. Longevity comes not only from the company's ability to innovate and respond to changing environmental factors and market demands, but the dedication of the people behind the company's products.

Tool Room Supervisor Chuck Cardillo, who has been with the company nearly 40 years, says the company's success is due, in large part, to the "dedication of our people and their passion for the products we make." President Bruce Dworak also cites a passion for excellence as a driving factor. "We are always striving to improve. We are not happy with the status quo and are always looking to push the envelope, whether it's to be more productive or provide an even higher level of service to our customers. Even if we have what others may consider a good year, we are always on the move to do more."

Bracale agrees. "Reaching the 110-year milestone is unique in and of itself, but throughout our history, we have also had very low turnover, which leads to continuity of process, and that sets us apart. Our team members – many of whom have been with us 25 years or more – know our products from beginning to end. Their longevity and knowledge are invaluable." The depth of knowledge and experience at Hobson & Motzer may be attributed to the enduring relationships Hobson & Motzer has built with area technical schools and trade associations. Fifty-one of the company's



NTMA Member Hobson & Motzer, a Connecticut-based precision metal manufacturer, has certainly beat the odds. Celebrating 110 years of continuous operation, the company has achieved a significant milestone.

No small feat considering the many obstacles they've encountered over the decades – from recessions to world wars to changing technologies.

### A Company on the Move

The company was established in 1912 when Alfred H. Motzer and Harold C. Hobson nailed a sign on the side of a barn in Meriden, CT, and opened shop. Expert craftsmen, they soon earned a reputation for innovation, precision, and high-quality work.

the company's knack for solving complex challenges gained attention, along with Hobson & Motzer winning many design awards.

One of the most pivotal moments in the company's history was the progression to wire electrical discharge machining (EDM) in the 1980s. A.E. Motzer adopted this technology very early on and the company became an expert in its use, ahead of many others. This was a huge step forward that substantially changed the complexion of the company. "That spirit of innovation and advancing technology has been a constant at Hobson & Motzer since 1912," says Director of Sales and Marketing Anthony Bracale. "It meant Hobson & Motzer was always well positioned

team members graduated from Connecticut vocational and technical schools.

Dworak and Cardillo – graduates of Vinal Tech and H. C. Wilcox machine tool programs, respectively – say these connections ensure a well-trained pool of tool and die makers. “We typically add one or two new apprentices every year. Over the years, this results in having a deep bench of 20-30 people of varying experience levels who are available to teach the next generation,” says Dworak. Dworak and Cardillo stay active in trade associations as well. Cardillo is on the board of the Technical Trade Advisory Council. Dworak is president of NTMA Connecticut Chapter. Four CTMA presidents have come from Hobson & Motzer, which was a founding member of the of the organization back in 1943.

Cardillo says the company’s collaborative approach makes team members feel valued and appreciated, which in turn, results in long-term dedication and loyalty. The company implemented an idea board system in 2015. In weekly meetings, department

employees share ideas on improving their department; whether related to safety, quality, or process improvements, Hobson & Motzer team members always have a voice.

“Employees are free to say what they want to say, and then – more importantly – see it actually getting done,” says Cardillo. “People who have joined Hobson & Motzer after working at other companies are surprised at how much their opinions are valued – over 1,500 employee suggestions are implemented each year.”

### Not on the Curve, Ahead of the Curve!

A passion for excellence, innovative spirit, attention to detail, and a dedicated workforce have all contributed to Hobson & Motzer’s steady growth over the years. But ultimately, it is the company’s ability to look to the future, to stay ahead of the curve, that will nurture and guide its success.

“Our focus is on working with customers on next-generation solutions. As medical devices advance,

they tend to get smaller, more sophisticated, and their components more precise, demanding more from the materials they are made from. This is our lane; it’s why we exist. We’ve succeeded for 110 years preparing for the next innovation in a market we are ideally suited to serve – med device. And at the end of the day, our efforts will improve the lives of surgeons and patients alike; there is great satisfaction in that,” says Bracale. Dworak likens the company’s future success to a flywheel. “You keep it spinning – perpetuating it with each new technology, product, and idea – each time adding a small amount of energy into the system. You couldn’t do all these things at once, from scratch. The reason we are where we are today is that we have built upon our successes and laid the foundation for another century of innovation and growth.”

*This article originally appeared in Mass Device and is reprinted here with the permission of the publisher. You can view the original article at: <https://www.massdevice.com/hobson-motzer-in-pursuit-of-excellence-for-110-years/>*



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## NTMA SERVICE AWARDS 2022 NOW ACCEPTING NOMINATIONS

The Service Awards are given out each year at the Manufacturing Engage Conference. We need your help finding the best candidates for these awards.

**Award categories are:**

### MEMBER AWARDS

#### HONOR AWARD

---

Nominate a member for continuing meritorious service and dedication to the industry and/or the Association by a regular member; traditionally awarded for longevity of service in dedication, as opposed to a single act or service in a short-time industry or Association position.

#### L.A. SOMMER MEMORIAL AWARD

---

For outstanding and continuing service of the highest magnitude; emphasis is placed on service to the Association by a regular member, both of the highest order and over a period of time, connoting excellence in a particular role in NTMA, rather than as a participant in a single event.

#### WILLIAM E. HARDMAN AWARD FOR EXCELLENCE IN TRAINING

---

For a company or individual (regular member or education member) which consistently demonstrated strong support and active participation in structured training for the precision custom manufacturing industry.

### NON-MEMBER AWARD

#### DISTINGUISHED SERVICE AWARD

---

For outstanding service to the industry by a person outside the NTMA regular member companies.

Help us recognize deserving individuals and/or companies that have supported and advanced the industry and the Association.

**Submit your nomination(s) by Friday, August 12th, 2022.**

**For a nomination form, contact Linda Warner at [lwarner@ntma.org](mailto:lwarner@ntma.org)**



## NTMA 6S Excellence Award

### PURPOSE:

To improve the perception of American manufacturing by promoting and recognizing excellence in member shop organization and efficiency.

### HOW IT WORKS:

- NTMA companies apply for the award by submitting a self-assessment based on criteria that demonstrate best-in-class practice in the six S's:
  1. Safety
  2. Sort
  3. Set in Order
  4. Shine
  5. Standardize
  6. Sustain
- Certificates are awarded every year for the first five years based on self-assessments submitted. Once the recipients receive five certificates, they are also presented with a trophy.

### SPONSORSHIP OPPORTUNITY:

- Conference exposure via introductions, etc.
- Promotional exposure: web, print, blogs, and emails that promote and support the award.

### SUBMISSION DUE DATE:

Please submit your application by September 1, 2022 to be considered.

For more information, please contact Linda Warner at [lwarner@ntma.org](mailto:lwarner@ntma.org) or 216-264-2824.

Applications and self-assessment documents can be found here:  
<http://www.ntma.org/resources/documents/6S-excellence-program>  
Applications should be sent to [6Saward@ntma.org](mailto:6Saward@ntma.org)

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# BE Get in Front of Your Sales & Marketing Plan

By: Gabe Draper, Co-Founder of Factur MFG Sales & Marketing

# PROACTIVE

That was the ultimate price I paid for not having a Sales & Marketing plan in place. Our shop had an ISO plan, we had a training plan for machinists, we had workflows for the shop, scheduling processes, a quality plan, all the things...except a proactive plan for revenue.

Since going broke in 2015, I've come to learn that this is an extremely common problem – far too many shops are reactive with the lifeblood of their business: their revenue. Many owners are betting their future on word-of-mouth and a just few customers.

If you're in that boat, putting a proactive Sales & Marketing plan in place and diligently following through with it (even when you're busy) will diversify your customer risk, increase your profit, give you an abundance mentality – and, ultimately, get you the kind of value you deserve for all your years of hard work.

**The good news?** Sales is a process, just like the rest of your shop. Let's break it down.

Not all Sales & Marketing processes are equal - but here is what it looks like for most shops:

*Branding > Marketing > Prospecting (Hunting ) > Introduction & Qualification > Follow up > Estimating > Quote Follow-Up > PO > Customer Kickoff > Customer Management (Farming).*

Start by doing an honest Gap Analysis of your shop. Each step needs a process – make sure you have someone who is accountable to follow it, and measurement standards to know how it's going.



## Branding

Your brand should be meaningful to your customers – something that highlights the unique value you bring to them. “XYZ Tool” might lack the identity of good branding; “Major Tool,” on the other hand, reflects their large scale of work. Investing in your brand is super important, even if it has probably the longest ROI.

## Marketing:

There is no silver bullet marketing tactic out there for shops (trust me – I’ve tried them all). Many can work but need focus, investment, and time before they do. My best advice: don’t start investing marketing dollars until you get your sales department built; that’s like buying material for a job when you don’t have any machinists. Someone has to process the leads. Marketing in general has the second longest ROI.

## Prospecting

Hunting for customers is grunt work, but somebody has to do it. Research, phone calls, emails, text messages, LinkedIn messages, referrals, pop-ins, networking – it takes a focused, disciplined, and relentless effort to get it done. Odds are you don’t have anyone in your shop that’s wired to do this work effectively, and if you did, often, they fit in with precision engineering culture like oil and water. Hire someone with a “killer mentality” for prospecting – they’re out there and they are just as savvy about their craft as your machinists. Offer them high-commission on new business only, with a taper down in the second year. Give them autonomy, but measure their activity – it typically takes 9-18 months to get an ROI, but you can spot laziness within 2 months. All sales cycles differ in length but speaking in averages, a good “hunter” will produce valuable conversations within weeks; RFQs in weeks to months; and POs in several months or quarters. Adapt your culture to include a person like this – you can’t treat them like everyone else, they’re a unique breed. Over-communicate positive things, be intentional about their social connection with the rest of your team, and recognize their achievements. And understand: you’re very likely going to have to pay them more money than most people on your team if you want to keep them.

## Introduction & Qualification

Once a conversation with a customer starts, get them on a video call to introduce your shop, articulate your value and qualify their company as a customer – and the company contact as the decision-maker. If they send you an RFQ before this, push for this call and qualify before quoting. Is this for order or budgetary? Do you have target pricing? Who else is quoting? Why do you need help from us? What pains are you having? How will you decide if we win the business or not? What is your timeline for this job? Do not quote blind.

## First Follow-Up

If you don’t get a near-term and clear next action for either a site visit or an RFQ, then disciplined follow-up is required. Someone needs to check in with the prospect monthly (or quarterly, at minimum) until you get a chance to bid on real work. Too often, we sit and wait for them to send us something and our hard prospecting work fizzles into nothing.

## Estimating

Do you have a quoting model that is repeatable? It must be sustainable – not hypothetical. Do you communicate quickly to the prospect if you are quoting or not? Do you communicate when you’ll have the quote back by?

## Quote Follow-Up

Are you aggressively following up immediately after sending the quote? Speed wins the day in this stage of your sales process! If you lose the quote, get feedback and learn your lessons. You should be winning 33% of all of your quotes, and 10-to-20% of initial quotes with new customers and prospects.

## Customer Kickoff

One good step to insert into your process is to host a customer kickoff meeting before starting on orders. This sets the tone and expectations for the future, builds the relationship, and makes everything down the road easier.

## Customer Management (Farming)

Zac Overton (of Overton Industries) once told me that his uncle Ron Overton made him physically visit each of their customers once a month. Zac was road warrior for a while – and that military discipline that Ron was instilling in him is a formula for your shop to grow. Have a process of getting regular feedback from customers – if the feedback is good, ask for more work and referrals. If the feedback is bad, fix it until it’s good.

## Systems:

Just like all of your other processes, your sales process needs a system to support it. Most ERPs aren’t great at this part. No matter what system you are using, each prospect needs to be in a Stage and have a Next Action at a very minimum. These need to be transparent so that there is visibility into what’s happening or not happening.

## Next Step

Don’t get overwhelmed! You can do this! Start today by outlining your high-level sales process and determine who is responsible for each step. Schedule weekly sales meetings to track progress and get more detailed in your process as you go!

Want to learn more about how Factur can help your shop with business development, prospecting, sales recruiting, and more?



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# 3 Things Manufacturers Can Do to Build a Marketing Presence and Drive RFQs

By: Matt Sordillo, Co-Founder and Head of Marketing Services, Paperless Parts

How do you get in front of engineers and buyers that are looking to get custom parts made?



70%

OF BUYERS USED GOOGLE  
OR THE INTERNET TO FIND  
NEW SUPPLIERS IN THE  
LAST YEAR.



Beyond a referral from a peer or coworker, part buyers often start by going to Google. 70% of buyers used Google or the Internet to find new suppliers in the last year. Buyers type in the name of a shop they may have heard about or the name of the service they are looking for, such as, "precision machining," in Google to see what comes up. The results serve as the first impression a buyer has of a shop. The days of part buyers calling or emailing a shop for quotes without visiting the website are over. However, this doesn't mean job shops need to spend an arm and a leg in both time and dollars on building out the most elaborate website. Rather, shops simply need to have an Internet presence and an easy way for these buyers to request a quote for the services they offer.

With this in mind, there are several steps shop owners can take to make a huge impact on how customers find and view their business. Here are some quick ways to start making an impact today!

## 1. Create a Google My Business Page

Have you ever searched for a product, service, or company on Google and seen a company profile on the right side of the results? This profile has business hours, phone number, location, reviews, images, a link to the website, and more. Setting up a Business Page is an easy way for shops to quickly establish an online presence while making a good first impression when customers search for their business or ones like it.

### BENEFITS:

- **Take up a large chunk of screen real estate on the right side of Google results when people search for your business**
- **Opens up an avenue for reviews that create credibility**
- **Show up in map results for users searching for your service**
- **Creates an enhanced connection with potential buyers who see you are real**
- **IT'S FREE!**

### Get Started Here

[www.google.com/business](http://www.google.com/business)

## 2. Build a LinkedIn Company Page

There are over 250,000 custom part buyers in the US on LinkedIn. You can reach them with a LinkedIn Company Page. Need I say more?

### BENEFITS:

- *Generate new business by connecting with potential and existing customers and asking them to follow your company page for business updates*
- *Google and other search engines rank LinkedIn pages in search results*
- *Opportunity to tell your company story while building credibility*
- *Establish another customer-facing image of your company*
- *Opens up another line of communication with potential customers STAY TOP OF MIND.*
- *Create the connection between your profile and the company page (Under the Experience Section of your profile)*
- **IT'S FREE!**

### Get Started Here

[www.linkedin.com/company/setup/new](http://www.linkedin.com/company/setup/new)

## 3. Be Crystal Clear About What You Do on Your Website

People judge a book by its cover. A company's website is the first thing a prospective customer will see when doing research into your shop.

### What do you want them to know about you right off the bat?

After seeing thousands of shop websites, I'm amazed by how many are not clear on their purpose. Differentiating yourself by the services you offer lets you stand out from the competition. It can also encourage potential customers to submit parts you like to make, reducing wasted back and forth for parts that are not a fit for your shop. For example, if you are trying to be a more niche machine shop specializing in complex parts with tight tolerances, or prototype parts with fast lead times, make that very clear for the visitor when they first land on your website.

### BEST PRACTICE CHECKLIST:

- *Let visitors know how good you are:*
- *Put out your on-time delivery percentage*
- *Add testimonials from customers*
- *Add a part gallery of the awesome parts you've made! (with customer permission)*
- *Set the right expectations, and use them to your advantage*
- *Tell visitors how quickly you respond to quotes (24 hours is the industry standard)*
- *Tell visitors your standard lead time*
- *Contact us page*
- *Name of company*
- *Email and phone*
- *Address*
- *RFQ page*
- *Add a simple form that allows your visitors to submit files*
- *JotForm.com has a great user-friendly form builder*

These are some of the basic things you can do to get your shop on the map. It's easy to put them off because quotes are coming in and jobs need to get out the door. With these simple steps, you can make sure you are in a position to retain and acquire new customers. For a more in-depth look at what you can do to hit the gas pedal on marketing your shop, contact Matt Sordillo, Co-Founder and Head of Marketing Services at Paperless Parts.

*Matt Sordillo was the Head of Marketing at RAPID, a CNC machining and sheet metal shop that grew to \$50M in sales and was sold to Proto Labs, Inc. (PRLB) in 2017 for \$120M. Today, Matt is the Chief Marketing Officer at Paperless Parts and is working to provide job shop owners the tools necessary to compete in today's increasingly digital business world.*

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# MULTI-TASKING METAL CUTTING AND MORE AT IMTS 2022

By: Tim Shinbara, VP & CTO, AMT – The Association for Manufacturing Technology

One of the hottest trends in CNC systems are the advancements in the single-setting concept embodied in the new multitasking machines exhibited in the Metal Removal Pavilion at IMTS 2022 (view floor plan).

Multi-tasking machines combine cutting with turning, milling, drilling, tapping, deep-hole boring, hobbing, skiving, broaching, grinding, and surface preparation. Hybrid multitasking machines add laser hybrid, friction stir welding, additive, and hot wire EDM. By performing all work in a single clamping, these machines cut set-up time, eliminate the risk of losing zero when parts move between workstations, and free operators to perform other tasks.

These machines especially appeal to job shops that would previously move parts between a lathe, vertical mill, and other machines to produce a final part profile. With labor scarce and demand high – orders of manufacturing technology surpassed \$650 million in November 2021 and are up 11.4% from 2020 (read report) – multitasking machines are a simple way to boost efficiency and quality with fewer operators. Even better, exhibitors are launching a new generation

of more affordable machines with new controls and conversational programming. They are making a concentrated effort to remove barriers to technology adoption.

“IMTS 2022 also embodies the ‘one-and-done’ concept, as there is no more efficient way to explore new manufacturing technology than a single visit to McCormick Place,” says Peter R. Eelman, vice president and CXO at AMT – The Association For Manufacturing Technology, which owns and produces IMTS. “Lean companies need smarter approaches. Connecting with the exhibitors in the Metal Removal Pavilion at IMTS 2022 helps them develop new strategies for more efficient part manufacturing.”

## Automation and Data

Because almost every strategy for manufacturing efficiency includes automation, CNC machines now come prepared with such features as an automatic door and robot interface. Machine designs have

changed to facilitate the ability to install a robot in front of a machine while also allowing operators to easily access the machine’s work envelope or tool magazine for set-up or manual process intervention.

“Machine manufacturers are also making it easier to harvest data by connecting machines with open standards such as MTConnect,” says Benjamin Moses, director, technology at AMT. “The emphasis is on tapping into the efficiencies possible through online data analysis applications, whether that’s related to CNC machine components or parts production. A recent report from McKinsey noted that benefits include decreasing downtime by 30-50% and increasing throughput by 10-30%. Visitors will be surprised at how easy it is to harness the power of data. All it takes to start is a conversation with exhibitors in the Metal Removal Pavilion.”

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## Estate Planning Updates to Consider for 2022

The new year is a great time to review your estate plan, along with setting other financial goals and resolutions. Estate planning is more than just drafting a will, filing it away, and hoping for the best; it's a dynamic process that should be reviewed periodically. Generally, estate plans should be reviewed every 5 years or in conjunction with a major life event to ensure your plan is up to date and consistent with your long-term family goals. The below are updates for 2022 estate planning and a few tips to keep in mind as you navigate the process: 2022 Estate and Gift Exemption Amounts Each Year, the US Treasury updates for inflation the annual lifetime gift and estate tax exemption amounts along with periodically updating the annual gift tax exclusion amount.

### Below are the 2022 Amounts:

- *Lifetime US gift and estate tax exemption up to \$12,060,000 (an increase of \$360,000 from 2021 tax year).*
- *Annual exclusion amount of \$16,000 per donee for tax-free gifts (\$32,000 for married couples). Up \$1,000 from \$15,000 in 2021 tax year.*
- *Top statutory rate on taxable federal estates remains at 40%.*

With many of the aggressive estate tax proposals being removed from President Biden's Build Back Better Act (BBBA), the golden age of estate planning is still here. Keep in mind that absent future legislation, the lifetime US estate and gift tax exemption will revert to 2017's lower \$5 million amount in 2026.

### Basic Estate Planning

For most families, a basic estate plan will include a will, possibly trusts (for example, a living trust), powers of attorney (financial and health), and letters of intent. A will discusses what happens to your estate upon passing and who assets go to, along with who you'll entrust to manage your estate as executor or a trustee of a trust. For assets that pass outside a will, for example retirement accounts, having updated

beneficiary designations are also important to review. Other items such as a central file or location for storing important documents, passwords, asset listings, letters, personal belongings, and family heirlooms, can also help in making administering an estate easier on your heirs and loved ones. A good rule of thumb is to review your estate plan every 5 years or so to assess whether your estate planning documents still reflect your goals. Some of the significant life events listed below can also trigger a review of your estate plan. Above all else, communication is key so that family members are aware of the estate plan in place. If you don't have a qualified estate planning attorney, or need a new recommendation, please contact your CBIZ advisor for referrals. We are happy to connect you with one.

### Review for Life Events

Life happens, and with that estate plans should be updated to ensure they reflect your family values and planned legacy. Below are some common life events that may cause a review in your plan:

- *Sale of a business*
- *Change in state residency*
- *Birth or adoption of a child and or grandchildren (consider education funding goals)*
- *Children reaching adulthood*
- *Divorce or remarriage (including prenuptial planning)*
- *Death of a spouse or family member*
- *Large changes in net-worth*
- *Changes in your health, a spouse's, or other family members*
- *Receipt of an inheritance or large gift*
- *Changes in philanthropic goals*
- *Major changes in federal and state tax laws*

### Advanced Planning

For families of significant wealth and taxable estates over \$12.06 million (\$24.12 million married filing jointly) many of the advanced estate planning strategies subject to repeal in the BBBA have lived on. The goal of these strategies in most cases is to "freeze and squeeze" the lifetime gift and estate tax exemption amount to get more mileage out of the \$12.06 million. Estate freezes ensure that future appreciation in assets gifted or inherited is not subject to estate tax while also locking in the

high exemption amount. Squeezing estates through discounts on lifetime gifts ensures that taxable gifts beyond the annual exclusion amount are efficient. For example, in 2021, Spousal Lifetime Access Trusts (SLATs) were a very popular advanced estate planning tool that wealthy families flocked to. With the prospects for additional legislation pushed into 2022, it may be worth brushing up on the use of SLATs with this helpful primer. Read more about SLATs here - <https://www.cbiz.com/insights/articles/article-details/trends-in-estate-planning-the-spousal-lifetime-access-trust-slat>. Keeping a cadence with annual exclusion gifts, especially when the exemption has been used up, is another way to continue to carve out value of your estate and minimize future taxes. Annual exclusion gifts can go a long way towards life goals for the next generation including purchasing a first home, education, starting a new business, or being able to engage in volunteer work.

### State Considerations

More and more, estate planning is becoming a state and local issue with the higher federal exemption amounts. Many families are considering both state and local income taxes, along with state estate taxes, with some considering a change in residence to lower tax states. For example, Washington state has an exemption of \$2.193 million with an estate tax rate ranging from 10-20%. Thirteen states currently have an estate tax including Oregon, New York, Maryland, and Illinois, to name a few.

### Key Takeaways

The golden age of estate planning continues on in 2022. We are encouraging families to continue making updates and reviewing their estate plans to take advantage of the all-time high estate and gift tax exemption amounts, account for new life events, and most importantly ensuring your estate planning reflects your legacy and values.

**If you'd like a review of your current estate plan or need help starting one, please let your**

**CBIZ team know at: <https://www.cbiz.com/forms/accounting-tax/connect-with-financial-services-ns>**



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Eric Hagopian, President/CEO – Pilot Precision Products

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Contact Bill Padnos, NTMF Executive Director for more information.

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# 5 Tips for Getting Better Product Photos

By: Rob Felber, Owner, Felber PR & Marketing



Shooting quality industrial and product images is a specialty, even among professional photographers. But between blog posts and social media content, you could probably use more high-quality and up-to-date images of your products and processes.

We've written before about the importance of minding the details when taking photos – making sure everyone in the frame is wearing proper safety equipment, for example, and not including any sensitive information, like part numbers or customer names – but this list is a little different.

**1. Light it up:** When it comes to photography, more light is always better, and natural light is always best. Do you make your products outside? No. But if you can take your product outside to get a picture, do it. Hint: move the item around to get the best light, meaning no shadows and no glare. You may need to move around, too, standing on a step stool to properly frame the products.

**2. Use a tripod or other brace for the camera:**

Camera shake is a thing. A bad thing. The more still the camera, the better the resulting image. Trust us on this.

**3. Invest in a good:** piece of white poster board!

Almost anything you photograph looks better on a white background. (Seriously.) Among other things, the stark white background will focus attention on your product and reduce shadows in the image. It's the best buck-fifty you'll ever spend on camera equipment!

**4. Side-eye it:** Professional photographers discuss the "rule of thirds" at length. Suffice to say, it's not always best to frame the main subject in the center of the image.

**5. Love the image?** DON'T SHARE IT until you run it by committee. We're not talking about a formal committee, but do remember to get some other people to review the photos before sharing. After you've followed all of this good advice, you'll probably be

pretty happy with your images. (You're welcome.) However, you may be seeing what you want to see. Before sharing any of your images, show them to a few people inside the company and ask them to tell you what they "see" in the image. Then ask someone from outside the company to describe what they see. A second (and third, and fourth) set of eyes is always valuable.

We get it – no one has an unlimited marketing budget.\* When you need to grab some quick pics, though, these tips will help you get the best images out of a basic point-and-shoot camera or even your phone.

*\*if you do, call us!*

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# The Future Is Bright

By: Michael Watkins, MBA/JD, EBITDA Growth Systems

I was sitting on the tarmac in Atlanta when I saw the following words appear on the little television screen of the fellow traveler cross the aisle – “**how far you go depends upon how far you go.**” I was so struck by these words that I had to write them down and share them with you, the NTMA family.

## What do these words mean to you?

Are you bullish on precision manufacturing in the short-to medium-term? Most analysts that cover our industry are. For example, Capstone Partners released the following forward-looking statement in its January 2022 Precision Manufacturing Sector Update – “key indicators including Industrial Capacity Utilization, Total Manufacturers’ New Orders, and the Industrial Production Index demonstrate the continued recovery

of manufacturing activity. Sector performance is expected to remain strong throughout 2022, driven by growth in key end markets including Defense, Medical Devices, and Electronics.” Capstone Partners is among the largest independently owned investment banking firms in the US. They get paid to get this stuff right.

It appears that now is the time to “make some hay” if you own a machine shop. There is no promise that the current economic environment will generate record revenues and profits, but it does appear that the road is being cleared for those lucky enough to be in the industry right now. Of course, luck is the intersection of hard work and opportunity. In other words, we make our own luck. So, there you have it. The stars and moon may be aligning for us to have a pretty good run.

If this is the game that is on the calendar, you may as well play it. But hoping that you get your fair share is not going to make it so. Hope is not a strategy. If ever there was a time to develop a real strategy, now would be it. Develop a real strategy that includes five plans – Sales, Marketing, Finance, Operation, and Management – and then flawlessly execute those plans with the help of trusted advisors that hold you accountable to getting it done. That is the prescription for profits in 2022-2023.



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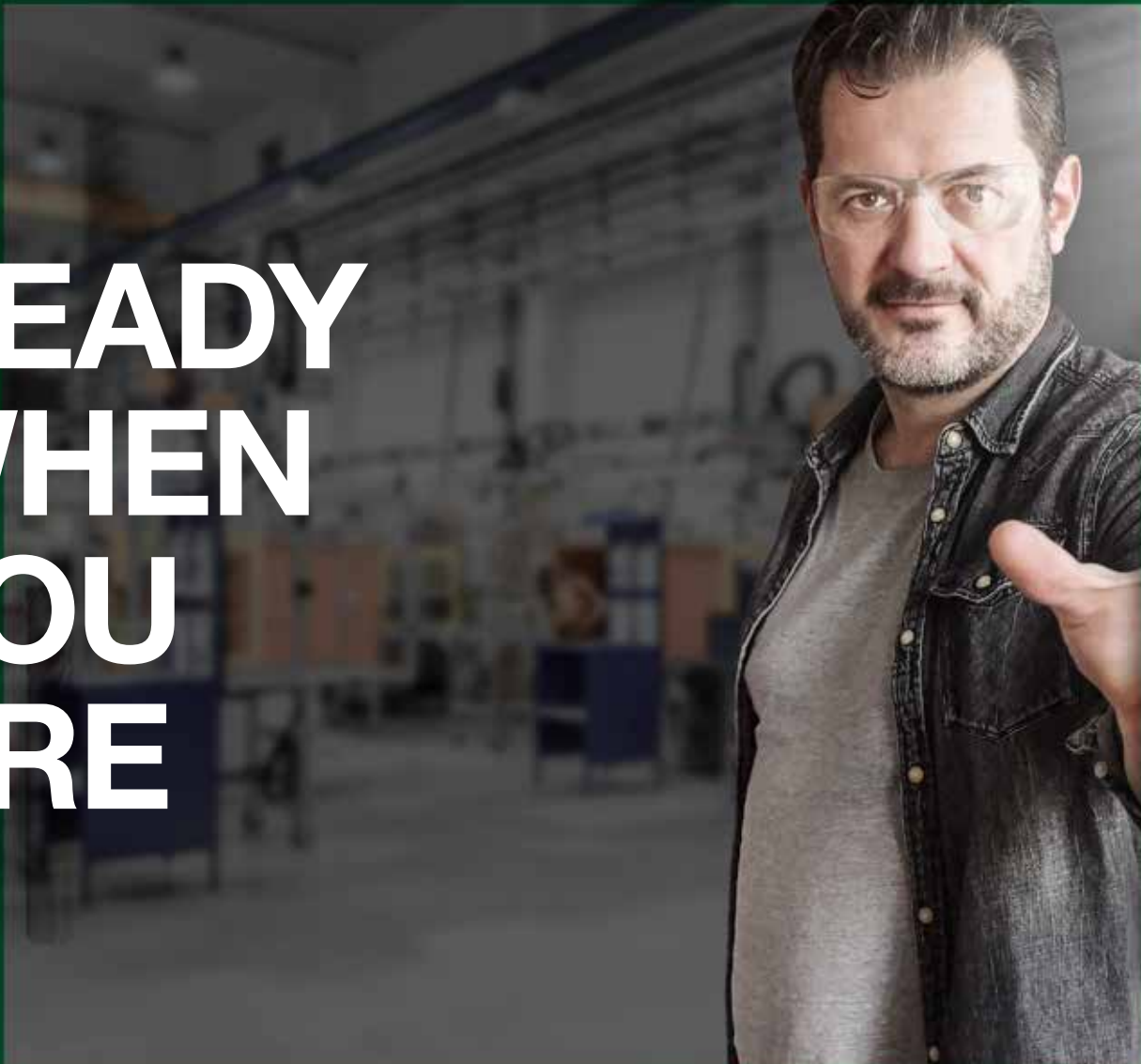
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