FROM EARLY COMMERCIAL TRAVELLERS TO PROFESSIONAL SALESPEOPLE: THE INFLUENCE OF ORGANIZED ASSOCIATIONS ON THE SALES PROFESSION

This paper describes the daily life of early commercial travellers, and the formation of travellers’ associations for the “moral, intellectual, and financial advancement” of their members. It follows the history of the associations to the formation of the Canadian Professional Sales Association, and its refocus to meet the needs of the modern sales professional.

The Early “Commercials”

Commercial travelling in Upper Canada dates before the mid-nineteenth century, when Montreal was the major distribution location. Buyers from east and west of Montreal would often travel to that city to view and purchase merchandise, although a “buying trip” from London, Ontario to Montreal at that time might take a month or more. (Hedley, 1894, p. 35) Representatives of commercial houses from New York were visiting merchants along Lakes Ontario and Erie. New Brunswick and Nova Scotia still traded mostly with England, but there was also strong trade with the eastern United States. West of Ontario, most merchandise trade was north-south.

Montreal importers began to consider sending their own representatives to compete with the ones visiting Upper Canada, coming from New York, London, and Glasgow. In 1848, Maitland, Tylee & Co. sent a man up the Ottawa River to sell groceries; other companies sent travellers to sell hardware and dry goods. (ibid., p. 36) The common mode of travel was horse and wagon, making visits to such places as Owen Sound, Goderich, Sarnia, Windsor, Chatham, and London, then travelling back through Hamilton, Toronto, and Kingston to Montreal. Sometimes, a traveller could be away for six months at a stretch, even during the later part of the century when rail transportation had improved substantially. (Belcher, 1883)

As the railway, canal, and communication systems continued to improve, Montreal solidified its hold on distribution. The great trading houses established there became not only suppliers to small-town merchants and shopkeepers, but also buyers of farm produce that they then exported. Following Confederation in 1867, commercial travellers representing Toronto and Montreal merchants began to focus on the Maritime Provinces. Indeed, these commercials were largely responsible for reducing dependence on England for trade, as through their visits they were “making Canadian goods known, and overcoming by persistent eloquence and by repeated object-lessons the prejudice that had existed against ‘Canadian’ merchandise and Canadian merchants.” (Hedley, 1894, p. 37)

For trade west of Ontario, representatives of Upper Canadian merchants arranged a system of bonding merchandise through the United States to Winnipeg, to compete with travellers
from St. Paul, Minnesota who were at that time supplying goods to merchants there. When British Columbia joined Confederation, Mr. W.E. Sanford, a Hamilton merchant who later became Senator Sanford, was the first commercial to visit that area with Canadian goods. He sold his merchandise through a bonding system that saw it travel through Chicago to San Francisco, and then by steamer to Victoria. (ibid., pp. 37, 167) Again, it was the visit of commercial travellers and the development of trade and commerce that helped break down the prejudices that existed in this remote region against distant “Canadians.”

**Daily Life of the Early Commercials**

The early commercials were not unlike Willy Loman in Arthur Miller’s *Death of a Salesman* – “a man way out there in the blue, riding on a smile and a shoeshine.” Belcher (1883) describes both the positive and negative aspects of a commercial traveller’s life. One positive aspect was the camaraderie shared among commercials who would often meet “on the road.” Commercial travellers also received higher pay, “freedom from restraint,” and excitement from travelling and “seeing and being seen.” (1883, p. 12) Merchants and shopkeepers welcomed those commercials who represented reputable trading firms and who sold quality merchandise.

Belcher classified commercials into twelve categories and described the behaviours of each: heavy, polite, noble, green, eccentric, nervous, lazy, antiquated, persevering, spreeing (otherwise known today as partying), religious, and industrious successful. He held this last group, the industrious successful, in the highest esteem and described their normal daily routine:

You will find him up early in the morning, with samples all arranged, breakfast over, and ready for business by the time the shutters are off. No late breakfasts, long smokes, or toasting his toes over the fire for him. That will do for the lazy. He sticks to his customers, pleads eloquently, and uses persuasive logic, trots up and down all day, never seeming to tire, carries his own samples. He scarcely finds time for dinner, and, wet or dry, he pegs along industriously all day, gradually removing prejudice, and winning his way into the good graces of men who, perhaps, otherwise would not have anything to do with the house he represents. He works hard until six or seven. Has he done, then? Oh dear, no! He, perchance, has another customer coming in, or has to pack his samples to be in readiness to get on to the next town, or has to write out the orders he has booked during the day. (1883, pp. 62-63)

In his book, Belcher outlined the characteristics needed to be a successful commercial traveller. They, for the most part, remain the same today for successful sales professionals as they did for the early commercial traveller: appearance, manners, a good nature, eloquence (since replaced by listening and questioning skills), enthusiasm, assurance, pluck, honour, self-respect, discretion, honesty, endurance, self-reliance, and perseverance. The latter characteristics – endurance, self-reliance, and perseverance – were needed to survive the less glamorous aspects of the commercial traveller’s job:

When we think of a man leaving family, home and friends, for weeks at a time, roughing it in all kinds of weather, putting up with inconveniences and discomforts, laying himself liable to catch all sorts of diseases, and taking chances of having his neck broken any day of the week, besides abusing his health by dissipation, irregular meals and sleep, and perhaps forming habits that like letters cut in the bark of a young tree, grow and widen until he cannot master
them, spending, perhaps, a good portion of his earnings to make and win friends and customers. (1883, pp. 63-64)

It was because of the hardships of commercial travelling, that men such as James Alexander Cantlie began to think of forming a benevolent group for their support and betterment. Prior to the formation of any formal body, whenever a commercial traveller passed away, leaving behind a widow and orphans, donations were requested to aid the family. Cantlie believed that, given the importance of the commercial traveller to the business community, it was an affront to their pride to seek such assistance. Consequently he was an early supporter for forming an association and was very influential in the organization of both the Commercial Travellers’ Association of Canada and the Dominion Commercial Travellers’ Association. He became the second president of this latter organization. (Hedley, 1894, pp. 80-81)

The Early Associations of Commercial Travellers

In 1871, a group of commercial travellers decided to band together, convinced they could benefit from doing so. The group’s first annual report was read at the Queen’s Hotel in Toronto the following year. (Commercial Travellers’ Association of Canada, 1922, p. 16) In 1874, the group passed a resolution to secure an Act of Incorporation, granted on May 26 of that year, approving the name “Commercial Travellers’ Association of Canada” (CTAC). (ibid., p. 16) The stated objective of the association was “the moral, intellectual, and financial improvement and advancement and welfare of its members.” (Commercial Travellers’ Association, Constitution, 1874, p. 13) The governance of the association was established as a board of directors, composed of a president, seven vice-presidents, a secretary and a treasurer, and twenty-eight other members of the corporation. (ibid., p.15) The association counted 558 members in 1874. (1922, p. 18)

A “commercial traveller” was defined at that time as a particular type of salesperson: “a man whether employer or employee, who travels statedly as salesman for a wholesale business to take orders from dealers or manufacturers for goods which shall be sent afterward.” (1874, p. 19) To be eligible for membership, commercials had also to travel at least four months in the year in Canada, and have a residence or business connection or at least an office in Canada. They must not have been expelled from any similar association in Canada for any offence involving a breach of faith with any company granting privileges to the association. Furthermore, they must not have been refused membership by any similar association for reasons other than a temporary interruption in meeting the qualifications for membership in the CTAC. (ibid., p. 20) The cost of membership was established at $10 per year, with honourary memberships available for $5 per year for proprietors or representative men of mercantile or manufacturing firms who were not engaged in commercial travelling. Honourary members received all benefits with the exception of travel privileges (e.g., discounted rail fares), including insurance. (ibid., pp. 21-22) The unique nature of the association was further reinforced when “peddlers,” or those individuals who travelled to sell to consumers, were excluded. (ibid., p. 21)

By February 1875, there was some dissension among members and a meeting was held at St. Lawrence Hall in Montreal where it was decided to secede from what had become known, among them at least, as “the Toronto Association,” to form the Dominion Commercial Travellers’ Association (DCTA). (Wadsworth, 1894, pp. 56-57) When this new association held its first annual meeting at Perry’s Hall, Montreal in December of that year, it reported a membership of no less than 251, and a cash balance of $529.92. (ibid., p. 58) For nearly a century, the two associations continued to develop independently, but maintained similar interests and objectives.
Common Interests and Objectives of the Travellers’ Associations

Travel Concessions

One of the first benefits sought by the Commercial Travellers’ Association of Canada was rail travel concessions from the railways. The CTAC’s first president, Warring Kennedy, announced at the 1874 annual meeting that Great Western Railway, Canadian Southern, and Toronto Grey and Bruce all offered a special rate of $0.02 per mile to members, 300 lb. of baggage, and half excess rates for greater weight. Both Midland Railway and Grand Trunk allowed similar baggage privileges, but charged regular mileage rates. The Northern Railway charged regular rates, but allowed members to buy return tickets for one and one-third fare if they departed from any station on the line on Saturday, and returned on Monday. Mr. Kennedy warned members that “they must go slowly and not ask the railways too much.” (1922, pp. 16-17)

When the Dominion Commercial Travellers’ Association seceded in 1875, one of its first actions was to approach the railway companies to ensure that they too would extend the same privileges to the new association. (Wadsworth, 1894, p. 58) It further negotiated special rates with steamship lines. Members got, for example, a twenty percent discount on passenger rates, meals, and staterooms when travelling from Montreal westward with the Richelieu & Ontario Navigation Company, but only on meals when travelling eastward. Commercials who travelled between Montreal and Pictou, Nova Scotia, or points between, on the Quebec Steamship Company’s “Miramichi” got a discount of 25 percent off regular passenger rates. (Dominion Commercial Travellers’ Association, 1891, p. 33)

Mortuary and Accident Benefits

In 1881, the Commercial Travellers’ Association of Canada introduced a mortuary benefits plan for its members, paying a maximum of $1,000 to those who had been members in good standing for ten or more years. The benefit was reduced by ten percent for each year less than ten consecutive years. In 1887, this plan was revised for new members so that they received benefits scaled according to their age at the time of commencing their membership. Between 1881 and 1922, the association paid out $1,774,000 to widows and orphans of members. (1922, p. 18)

The Dominion Commercial Travellers’ Association passed a resolution in 1876 at its second annual meeting and added a new twist: it insured its members for a $1000 death benefit and added a $5 weekly indemnity in case of accident. (Wadsworth, 1894, p. 62) In 1881, it decided to investigate its own plan for mortuary benefits as its capital excess had now reached $22,670. A committee was established and its recommendation was that mortuary benefits should start at $200 for members who had paid their second year’s membership, and increase by $100 for each successive year of membership, to a maximum of $500. Members should also receive $5 per week to a maximum of thirteen weeks in the event sickness prevented them from working. (ibid., p. 65) In 1884, it increased the maximum mortuary benefit to $800. (ibid., p. 68) In 1885, the executive reported at its annual meeting that sixteen members had died during the year, and the association had paid out $10,559.28 in benefits. Fortunately, DCTA’s surplus continued to grow and had reached $47,916.32, partly attributable to a $5,000 saving on accident insurance. (ibid., p. 69) The trend in healthy surpluses continued so that in 1889, the maximum mortuary benefit was increased from the previous $1,000 maximum for members who had ten years of continuous membership to include an additional $25 for each additional year of membership beyond ten years to a maximum benefit of $1,200. (1891, pp. 22-23)
In 1886, the Dominion Commercial Travellers’ Mutual Benefit Society was formed at a meeting held on January 2, at the Windsor Hotel, Montreal. (Wadsworth, 1894, p. 76) Membership to the society was open to any member of any commercial traveller’s association in Canada. In its first year, the society received 406 applications for admission. Membership costs were $1, payable with application, and six annual assessments ranging from $1.10 each if the member was under 25 years of age to $2.50 each if the member was between 45 and 50 years of age. There were some constraints on memberships for mortuary benefits. Members over 55 years of age would have to waive their rights to mortuary benefits, but could still receive benefits that were covered by the accident policy. (ibid., p. 77) In 1891, the secretary of the Dominion Commercial Travellers’ Association attended the eighth Annual Convention of the Travellers Protection Association of America in Denver, Colorado. As a result, the latter association adopted a similar mortuary benefits plan for its members. (ibid., p. 72) By 1893, membership in the Dominion Travellers’ Association of Canada exceeded 1,000 members, with an average cost for $1,000 insurance ranging from $7 to $16 per annum, depending on the member’s age. (ibid., p. 77)

Political Lobbying / Activism

Another important activity of the travellers’ associations was to represent the interests of their memberships with respect to taxes, fees, and licenses.

In 1877, the Dominion Commercial Travellers’ Association represented two members who were arrested in Charlottetown, P.E.I., and were each fined $50 for selling without licences. The court ruled in favour of the association, and declared the imposition of licences illegal. (ibid., p. 62) In 1881, a decision appealed from the lower courts, “Jonas vs. The City of St. John,” was also decided in favour of the association. (ibid., p. 65) At its 10th annual meeting in 1884, the association executive reported that a decision against the City of Quebec was being appealed by the city to a higher court. A decision had also been made against the City of Three Rivers for the imposition of an illegal tax against one of its members. (ibid., p. 68) Three years later, on May 18, 1887, the Legislature of Quebec finally passed a bill prohibiting any municipality from imposing a tax on commercial travellers. (ibid., p. 70)

In 1922, the Commercial Travellers’ Association of Canada successfully lobbied the Minister of Finance concerning a tax that commercial travellers were called upon to pay, levied on portions of expense accounts classed as income. In the same year, it successfully convinced the Board of Railway Commissioners to rescind a twenty percent increase in excess baggage rates that went into effect in 1920. (1922, p. 33)

Other Benefits and Activities

Since its inception, the Commercial Travellers’ Association of Canada hosted an annual dinner for its membership at Toronto’s Royal York Hotel. Generally these dinners were held in conjunction with the annual CTAC board meetings to save on expenses for the CTAC executive. These dinners were well attended and always featured an address by important business luminaries of the day, sometimes including the Prime Minister of Canada. To keep its membership abreast of changes, the Association also commenced publishing of a monthly communiqué titled Canadian Traveller that it distributed to its membership. The Canadian Traveller featured articles on etiquette, religion, sales tips and other wide-ranging issues, along with published discounts for hotels and railways, and paid advertisements for clothing, cigars, and toiletries.
At its second annual meeting, in 1876, the DCTA discussed the need for a library for its members. Due to a lack of financial resources, the association decided against establishing its own library. However, for $100, it obtained rights for its members to use the library at the Mechanics’ Institute. (Wadsworth, 1894, p. 58)

The CTAC asked members for voluntary donations of $1 per year to establish and maintain its Benevolent Fund. Between 1887 and 1922, the CTAC distributed $37,500 to needy members. (1922, p. 20) The DTAC established an education fund and awarded up to five scholarships for children of deceased members. These scholarships were available for children between the ages of 8 and 14 years and could be held at most public education institutions. (1891, pp. 29-31)

At its third annual meeting, in 1877, the DCTA approved a $200 donation to the Montreal General Hospital, and it matched the donation the next year. At the 1879 annual meeting, the donation was increased to $400, and in 1881, it was increased to $500. (Wadsworth, 1894, pp. 62-64) The CTAC donated $45,000 for patriotic purposes during World War I. In addition, it kept over 300 members’ certificates in good standing while they served overseas. (1922, pp. 19-20)

Changing Times – A Changing Association

Throughout most of the 20th century, the Commercial Traveller’s Association of Canada and the Dominion Commercial Traveller’s Association maintained a friendly rivalry, with each association introducing upgrades to their insurance and travel programs. Gradually as travel expanded, so too did the benefits that each offered to its membership.

The two associations continued to coexist in relative harmony until the early 1960s, where changing times brought about a significant event. Due to declining membership in the DCTA, its board met and reached a consensus that it would approach the CTAC with a proposal to amalgamate the two associations. On June 3, 1964, a Statement of Amalgamation Agreement was signed between the two associations. Under the terms of the agreement, the Dominion Commercial Traveller’s Association ceased to exist, and its assets, property, and membership were assumed by the Commercial Traveller’s Association of Canada.

Furthermore, specific provisions concerning the composition of the CTAC’s board were written in to reflect regional interests and the contributions made by French Canada. Two regional committees were established: the Ontario Western Committee and the Quebec Eastern Committee, where at least three members of the latter had to be French-speaking or bilingual. The CTAC board also established a seven-person executive committee whose members were drawn from both committees, with Ontario having four members to Quebec’s three members. The Association’s head office was designated in Toronto with satellite offices in Montreal and Hamilton.

In 1986, the CTAC changed the name of its membership communiqué to Contact, to reflect the association’s commitment to improving membership communications. Designated committees on membership, education, public relations, and benefits all contributed news items to every issue. Along with the new name came the establishment of an annual scholarship fund, where one award valued at $3,000 was presented to a CTAC member who wished to continue his or her education through full-time enrollment in an MBA program. Len Vasil, the CTAC’s
president, announced the establishment of an annual CTA-MBA Scholarship Fund, the intent of which was “to assist in the development of our profession’s future leaders.”

Building on the scholarship initiative, the CTAC’s board of directors endorsed a new mission statement and outlook for the association at its September 1988 meeting. In addition to its insurance and travel offerings, the CTAC’s mission would be to focus on professional development programs, the provision of support services, a membership benefits program, and presenting a “strong, unified voice” to government. The mission statement’s four pillars were developed from an extensive two-year study and evaluation of members’ needs. The study also revealed that the “the overwhelming majority [of members] said sales was their profession, not just a stepping stone to a career in some other part of business.”

The CTAC also underwent an internal reorganization, and individual departments were set up and aligned with the four pillars in its mission statement. The education department was charged with keeping members informed of developments in the sales profession through publications, seminars, workshops, focus groups, and surveys. The communications department focused on developing public media and government relations to increase name recognition and awareness. The member benefits department was tasked to increase and improve the benefits for the membership.

**The CTAC becomes the Canadian Professional Sales Association**

With a refocused mission statement and a renewed objective to increase its membership base, the CTAC felt it was time to re-evaluate its image in the eyes of the profession and the public. Early in 1989, the CTAC established a task force to examine the association’s identity and its need for improvement. Member feedback revealed that the CTAC was not well known in Canada, aside from the sales community, and that the CTAC had an image problem to overcome if it were going to attract new members, especially women, and sell the association to a wider audience. The end result was a new logo and a new name, unveiled in 1991. The CTAC changed its name to the Canadian Professional Sales Association (CPSA) and replaced its red and blue maple leaf logo with a blue and grey bar graph. Terry Ruffell, the CPSA’s president commented on the rationale behind these changes:

“Traditionally, our outdated image was the biggest obstacle we had to overcome… The term commercial traveller is seldom used anymore, and many newcomers to the sales field were having difficulty relating to it. The name recognizes all possible positions within the field, from agent, representative, district or national manager, to vice-president of sales and marketing… the word “professional” in our new name refers… to our members. (1991)"

With a new logo and a new name, the CPSA pushed forward with its efforts to establish clear goals for its members’ education. Initiatives included the creation/production of the *Canadian Sales Management Manual*, a professional development catalogue, an information hotline and library service, and the creation of a framework for an association certification program.
The CPSA Sales Institute and Sales Certification

The CPSA Sales Institute was established in 1994. Its purpose was “to establish a positive image and enhance the value and credibility of the sales profession by establishing standards, a code of ethics, certification, and ongoing professional development programs.”

One of the Sales Institute’s first achievements was to establish a comprehensive certification process for professional sales representatives across Canada. The CPSA established an Occupational Standards Committee to oversee the developmental stages of the project, and to set the standards required by sales professionals. Focus-group testing and validation teams from across Canada were assembled to help establish a comprehensive definition of the core competencies required by sales representatives and sales managers. The result was the Certified Professional Sales Representative program that was rolled out to over forty Canadian colleges and universities. In 1997, the designation was changed to the Certified Sales Professional (CSP) and it remains the only recognized and fully accredited designation for salespeople in Canada.

To receive certification and the professional designation CSP, candidates must meet specific criteria relating to work experience, education, and professional development. They must also successfully pass an oral examination, administered by the CPSA Sales Institute. Completion of the CSP program at a college or university (or through a self-study program directly through the Sales Institute) is one criterion for participating in the examination process.

Furthermore, the Sales Institute developed a Code of Ethics that each certified sales professional is required to sign and to which each must promise to adhere. CSPs are pledged to uphold the following standards:

Maintain honesty and integrity in all relationships with customers, prospects and colleagues
Accurately represent their products/services
Respect and protect the proprietary and confidential information entrusted to them by their company and customers
Continually upgrade their knowledge of products/services, industry and skills
Utilize their time and resources for legitimate business purposes and participate in legal and ethical activities only
Respect their competitors and their products/services through honest, truthful and accurate representation
Engage in business and selling practices that contribute positively to the community
Assist and counsel fellow sales professionals
Abide and encourage others to adhere to the Code of Ethics

In 2002, the CPSA partnered with the Manufacturers’ Representatives Educational Research Foundation (MRERF), a U.S.-based consortium of 35 primarily industry-specific associations of agents, brokers, and manufacturers’ representatives, to market its Skills for Success training program and its CSP designation in the United States.

By the start of 2004, there were over 2,000 sales professionals in Canada who had achieved their Certified Sales Professional designation and the CPSA continues in its efforts to raise the bar for the sales profession.


