

EVALUATION OF A PROSPECTIVE REPRESENTATIVE

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Rep Firm: _____ Date: _____
Address: _____
City/State/Zip Code: _____
Phone: _____ Fax: _____
E-mail: _____ URL: _____
Person Interviewed: _____ Title: _____
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1. REPRESENTATIVE COMPANY INFORMATION:

(a) History:

- (1) Are you a corporation, a partnership or a sole proprietorship? _____
- (2) In what state (and year) was your business established? _____
- (3) Who are the owners of your company and at what percentage ownership? _____

- (5) Does your company have a Web site? May we view it now? _____

(b) Company Growth and Future Plans:

- (1) Will you describe your sales performance history? _____

- (2) Do you have a formal marketing plan? _____
- (3) Do you prepare an annual budget? _____

(c) Territory Covered and Market Served:

- (1) What territory do you cover? _____
- (2) Will you supply a territory map? _____
- (3) Will you accept deviations from your traditional territory? _____
- (4) What do you consider to be your primary and secondary markets? _____

(d) Office Facilities:

(1) How many offices do you have? Locations? Number of outside/inside sales personnel per office?

(2) Virtual offices: describe your home-office set-up of employees (number of phone lines, fax, modem/connection):

(3) Do you use contact tracking software? Which?

(4) Do you use computer order tracking software? Which?

(5) Describe the "information connections" you have with other principals (Web/browser based, dial-in, dedicated line):

(e) Warehousing:

(1) Do you have a warehouse?

(2) What is its size?

(3) Do you presently stock items for resale?

(f) Personnel:

(1) How many people are employed by your company? How many full time? How many part time?

(2) How many outside salespeople do you have? How many inside salespeople?

(3) How many administrative support people do you have? What are their duties/responsibilities?

(4) How many people are involved in the management of your company?

(5) Are any of your people Certified Professional Manufacturers' Representatives (CPMRs)? How many?

(6) How many of your people hold degrees? What types of degrees (business/technical)?

(g) Present Lines Represented:

(1) Please furnish a complete, current line list:

(2) What lines are most synergistic with our products?

(3) Do any of our products conflict with any of your principals?

(4) Will you supply several principal references?

(h) Professional Affiliations:

- (1) Are you a member of ERA? _____
- (2) Are you a member of any other trade associations? _____
- (3) Are any of your people members of IEEE? _____
- (4) Are you a member of the Chamber of Commerce? _____
- (5) Do you or any of your people have any other professional affiliations? _____

(i) Stock Ownership in Companies You Represent:

- (1) Do you, or any of your people, participate in stock ownership of any of your current principals? _____

2. VALUE ADDED MARKETING SERVICES:

(a) Quotations:

- (1) Do you prepare and present quotations? _____
- (2) Do you prepare and present proposals? _____
- (3) Please demonstrate your procedure for quotations (log-in, presenting to customer, tracking, follow up) _____
- (4) Please demonstrate your procedure for samples (log-in, presenting to customer, tracking, follow up) _____

(b) Sales Forecasts:

- (1) Do you prepare sales forecasts — how many and how often? _____
- (2) Are these forecasts initiated by you or required by your principals? _____
- (3) Do you or your principals have a program to follow up on these forecasts? _____

(c) Market Surveys:

- (1) Do you conduct market surveys for any of your principals? _____
- (2) How are you compensated for conducting these surveys? _____

(d) Rep Councils:

- (1) Do you participate on any Rep Councils? _____

(e) Purchase Order Management:

- (1) Do you accept and manage (expedite) orders for your principals? _____
- (2) Are you compensated for this service? _____

(f) Sales Performance:

- (1) How do you monitor sales performance of your company and of your outside salespeople? _____
- (2) Do you report sales performance to your principal if requested? _____
- (3) Do you provide regular sales activity reports to your principals? _____

3. VALUE ADDED SALES PROMOTION:

(a) Direct Mail:

- (1) Do you have a direct mail program? _____
- (2) Is your mail list computerized? _____
- (3) How many people are on your mail list and how was it compiled? _____

- (4) Do you use "bounce back" cards in your mailings? _____
- (5) Do you have your own company mailer? _____
- (6) How often do you do mailings? _____
- (7) How much do your principals contribute to the cost of your mail program? _____
- (8) Do you do any direct e-mail programs (e-mail promotion of products)? _____

(b) Trade Shows:

- (1) Do you participate in local trade shows — which ones? _____
- (2) Do you participate in national trade shows — which ones? _____
- (3) What support do you expect from your principals for these activities? Do you co-op cost estimates for each? _____

(c) Sales Literature:

- (1) Do you have a professionally printed line list? _____
- (2) Do you prepare sales promotional literature for any of your principals? _____
- (3) Do you produce a newsletter? If so, how often? _____
- (4) Do you have computer graphics capability? _____
- (5) Do you have your own catalog? _____
- (6) Do you have any other sales promotional activity? _____

4. VISITS BY FACTORY PERSONNEL:

(a) Policy Regarding Territory Visits by Factory Personnel

- (1) Do you work from a prepared itinerary? May we see an example? _____
- (2) Who is responsible for trip reports? _____
- (3) Do you have a policy regarding customer entertainment expenses? _____
- (4) How often and under what circumstances are such visits warranted? _____

5. COMPENSATION:

- (a) How do you compensate your salespeople? _____

- (b) Do you have any incentive programs? _____
- (c) Do you have a profit sharing program? _____

- (d) Do you have a qualified retirement program? _____
 - (e) What type of insurance plan do you have for your employees? _____
 - (f) Do you pay your employees' expenses? _____
 - (g) Do you have employment contracts? _____
 - (h) What other benefits is your company providing? _____
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6. TRAINING:

(a) Product Training:

- (1) Will you send your salespeople to factory seminars? _____
- (2) Will you send your salespeople to regional seminars? _____
- (3) What expenses will you expect the principal to pay? _____
- (4) Will you plan and facilitate product training at your facilities? _____

(b) Sales Training:

- (1) Do you provide a regular sales training program for your salespeople? _____
- (2) Do your people attend sales training programs and/or seminars? _____
- (3) How often do they attend? _____
- (4) Do you subscribe to any sales consultant or improvement programs? _____

(c) Improvement Programs:

- (1) Do you encourage your employees to further their education at company expense? _____
 - (2) What type of continuing education programs are you promoting for your employees to keep abreast of our changing times? _____
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7. TERRITORIAL COVERAGE:

- (a) What type of customers do you contact? _____
- (b) How do you rank your customers? Who are your key accounts? _____
- (c) Are your salespeople assigned by account, geographical area or by type of line? _____
- (d) Will you provide us with customer references? _____

8. OTHER VALUE-ADDED SERVICE:

- (a) Do you have service or calibration facilities? _____
- (b) Do you conduct product demonstrations? _____
- (c) Can your salespeople perform minor repair services? _____
- (d) Do you perform any other value-added services? _____

