
EVALUATION

OF A

PROSPECTIVE

REPRESENTATIVE



ELECTRONICS REPRESENTATIVES ASSOCIATION

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EVAUATION OF A PROSPECTIVE REPRESENTATIVE FORM

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? _____

(4) Will you furnish a brief company history or brochure? _____

(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? _____

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? _____

7. TERRITORIAL COVERAGE:

(a) What type of customers do you contact? _____

(b) How do you rank your customers? Who are your key accounts? _____
