

Interview/Evaluation Form for a Prospective Representative

Date: _____

Because the selection of agents is so crucial to the success of your sales program, it is imperative that this choice be based on comprehensive information that can only be obtained through pre-screening and in-depth personal interviews. There is a tendency to classify agents as one group, but there is a wide variety of agency operations in every industry—one person and father/son or daughter operations, firms with 10 salespeople covering a particular area, and companies with 30 salespeople and 10 offices concentrating their efforts in the metropolitan areas, etc. Each has its own advantages, and your efforts to find the proper match will succeed if you persist in the search.

The preliminary screening process should include:

- (1) A general matching of the agent's sales territory with the area you wish to cover. However, it needn't be an exact fit; the agent may be willing to make adjustments to fill your needs.
- (2) Reviewing his product specialization and/or the industry he serves for compatibility with your own role in the marketplace.
- (3) Making inquiries within the industry as to the prospective agent's reputation and success in selling current lines.

Distance may dictate that you do some of your screening of prospective agents by telephone. If this is the case, don't judge the worth of the candidate by the sound of his voice or by how readily he tells you what you want to hear. Use the call strictly for the gathering of facts, and to make sure you treat all the agents fairly and have some basis for comparison; use the same guidelines for all agents during your telephone interviews. However you conduct your screening, here are some of the points you will want to cover, adding or subtracting from the list as needed to fit your own special requirements.

Interview Form for a Prospective Representative

Name: _____

Address: _____

City: _____ State: _____ ZIP: _____

Phone: _____ Fax: _____

Person Interviewed: _____ Position: _____

E-Mail: _____ Web Site: _____

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

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 have a business succession plan? _____
4. 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. Under what conditions 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 and what are their size and locations? _____
2. Please describe your investment in technology and telecommunications equipment. _____
3. Do you use contact tracking software? _____
4. Do you use computer order tracking software? _____
5. How do you track commissions? _____

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 full-time people are employed by your company? _____
2. How many part-time people are employed by your company? _____
3. How many outside salespeople do you have? _____
4. How many inside salespeople do you have? _____
5. How many administrative/customer support people do you have? _____
6. Do you have independent contractors working for you? _____
7. How many people are involved in the management of your company? _____
8. Are any of your people certified (CPMRs/CFSPs) or enrolled as CPMR/CFSP candidates—how many? _____
9. How many of your people hold college degrees? _____
10. Will you furnish resumes of your key people? _____

G. Present Lines Represented

1. Will you furnish a complete, current line list? _____
2. Do you feel there is compatibility 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 an association of MAFSI? _____
2. How long have you been a member of MAFSI? _____
3. Are you a member of the Chamber of Commerce? _____
4. Do you or any of your people have any other professional affiliations? _____

I. Stock Ownership

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

Value Added Marketing Services

A. Quotations

1. Do you prepare and present quotations? _____
2. Do you prepare and present proposals? _____

B. Sales Forecasts

1. Do you prepare sales forecasts 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 Research

1. Do you conduct market research for any of your principals? _____
2. How are you compensated for conducting this research? _____

D. Representative Councils

1. Do you participate on any Representative Councils _____

E. Purchase Order Management

1. Are you on line with any of your principals with EDI? _____
2. Do you accept and manage (expedite) orders for your principals? _____
3. How are you compensated for this service? _____

F. Sales Performance

1. How do you monitor sales performance? _____
2. Do you report sales performance to your principal if requested? _____
3. Do you provide regular sales activity reports to your principals? _____

Value Added Sales Promotion

A. Direct Mail

1. Do you have a direct mail program? _____

2. How many people are on your mail list and how was it compiled? _____
3. Do you use "bounce back" cards in your mailings? _____
4. Do you have your own company mailer? _____
5. How often do you do mailings? _____
6. How much do your principals contribute to the cost of your mail program? _____

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? _____

C. Sales Literature

1. Do you have a professionally printed company brochure? _____
2. Do you prepare sales promotional literature for any of your principals? _____
3. Do you produce a newsletter? _____
4. Do you have computer graphics capability? _____
5. Do you have your own catalog? _____
6. Do you have any other sales promotional activity? _____

Visits By Factory Personnel

A. Policy Regarding Territory Visits by Factory Personnel

1. Do you work from a prepared itinerary? _____
2. Who prepares the itinerary? _____
3. Who is responsible for trip reports? _____
4. Do you have a policy regarding customer entertainment expenses? _____
5. How often and under what circumstances are such visits warranted? _____
6. How much lead time is necessary to schedule a factory visit? _____

Compensation

A. How do you compensate your salespeople?

1. Do you have incentive programs? _____
2. Do you have a profit sharing program? _____
3. Do you have a qualified retirement program? _____
4. What type of insurance plan do you have for your employees? _____
5. Do you pay your employees expenses? _____
6. Do you have employment contracts? _____
7. What other benefits is your company providing? _____

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? _____

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? _____

Other Value Added Service

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

References/Finance

- (a) Name(s) of bank(s) and account numbers? _____
- (b) Do you have a line of credit? _____
- (c) Do you have a cash reserve? _____
- (d) Will you provide several trade references? _____

Additional Information

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