

Business Review Best Practices Survey - 2021

Master Index Survey Data

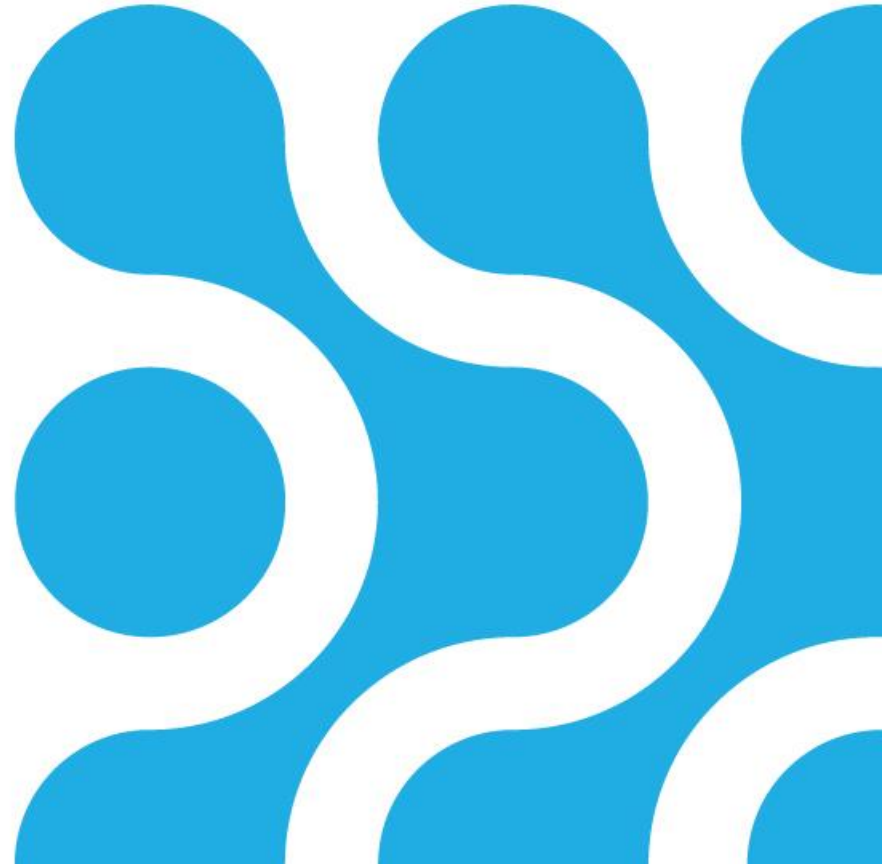
Survey Dates: Feb 16 – Mar 2, 2021

Dale Ford – Chief Analyst

March 11, 2021



Electronic Components Industry Association



Index

1. Local Distributor Branch with Local Manufacturer / Manufacturer's Representative
2. Manufacturer's Representative with Manufacturer
3. Corporate - Distribution with Manufacturer

Topics Covered for Each Section Above

- Survey Participation Statistics
- Ideal Review Frequency
- Ideal Review Length
- Ideal Review Time Allocation
- Introduction Item Importance
- Sales Performance / KPI / Funnel Review Item Importance
- Distribution Item Importance
- Marketing/NPI Item Importance
- Actions & Wrap-up Items Importance
- Word Clouds for Advance Preparation, Goals & Discussion Elimination Inputs

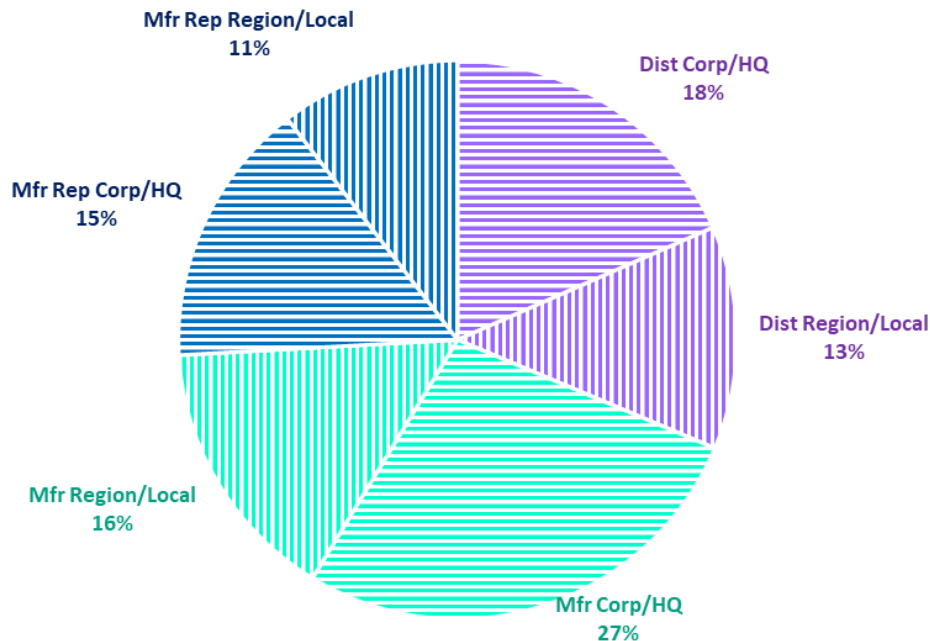
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Overall Survey Participation

Participant Profile

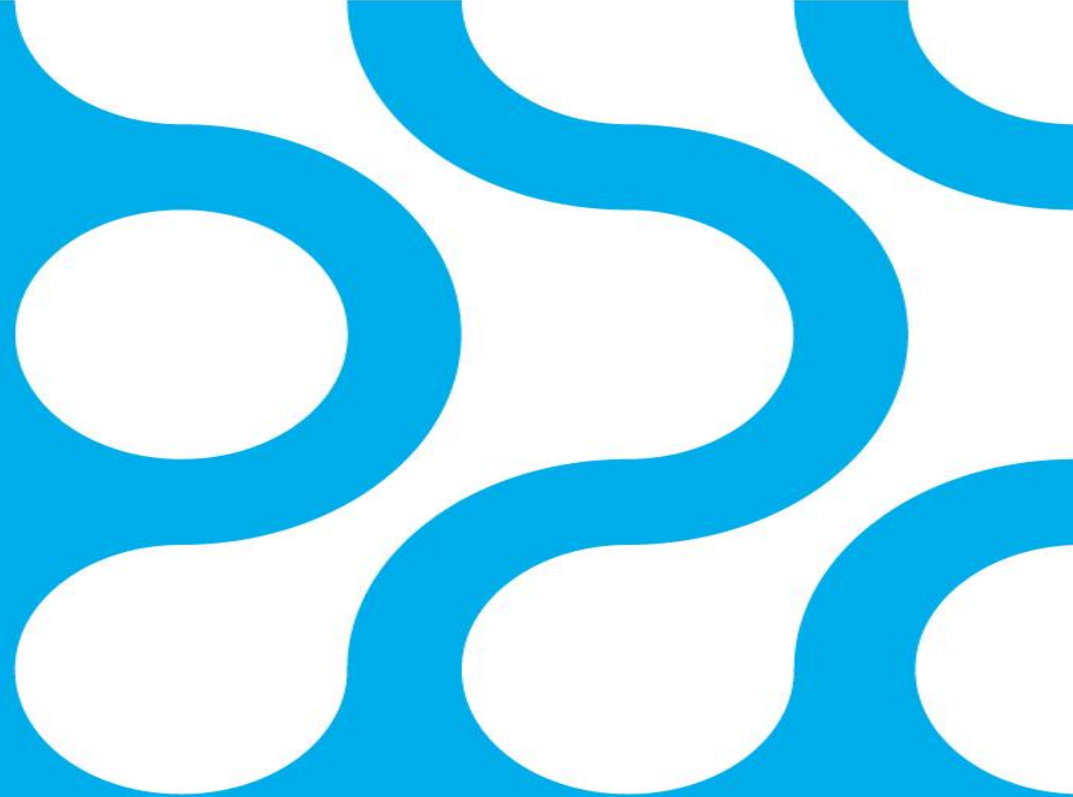
Total Participants = 201



GROUP	Number	Percent
Dist Corp/HQ	37	18%
Dist Region/Local	26	13%
Mfr Corp/HQ	55	27%
Mfr Region/Local	31	15%
Mfr Rep Corp/HQ	31	15%
Mfr Rep Region/Local	21	10%
Corp / HQ	123	61%
Region / Local / Field	78	39%
Distributor	63	31%
Manufacturer	86	43%
Manufacturer Rep	52	26%
TOTAL	201	

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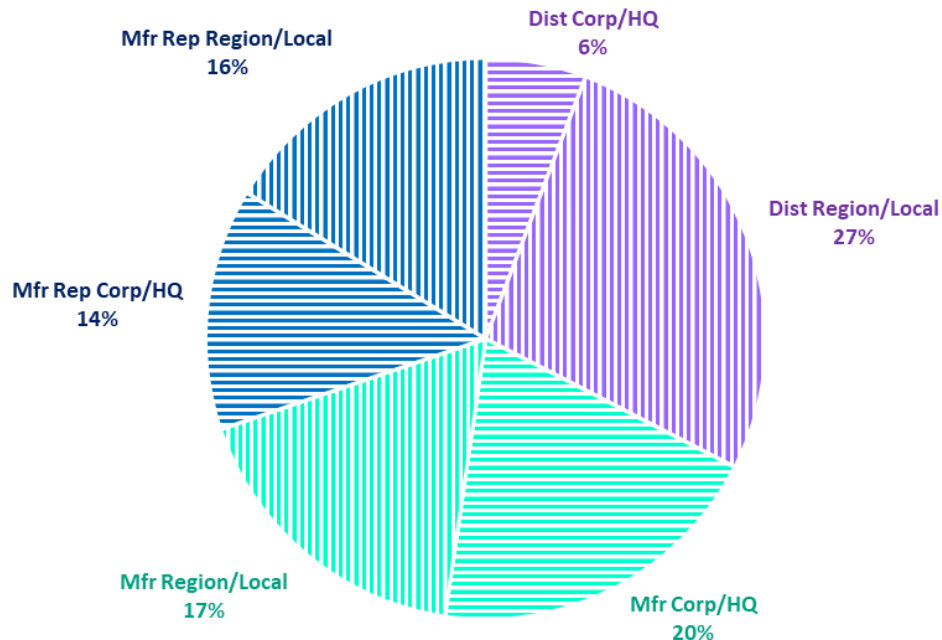
**Local Distributor Branch
with Local Manufacturer /
Manufacturer's
Representative Review**



Local Distributor Branch with Local Manufacturer / Manufacturer's Representative

Participant Profile

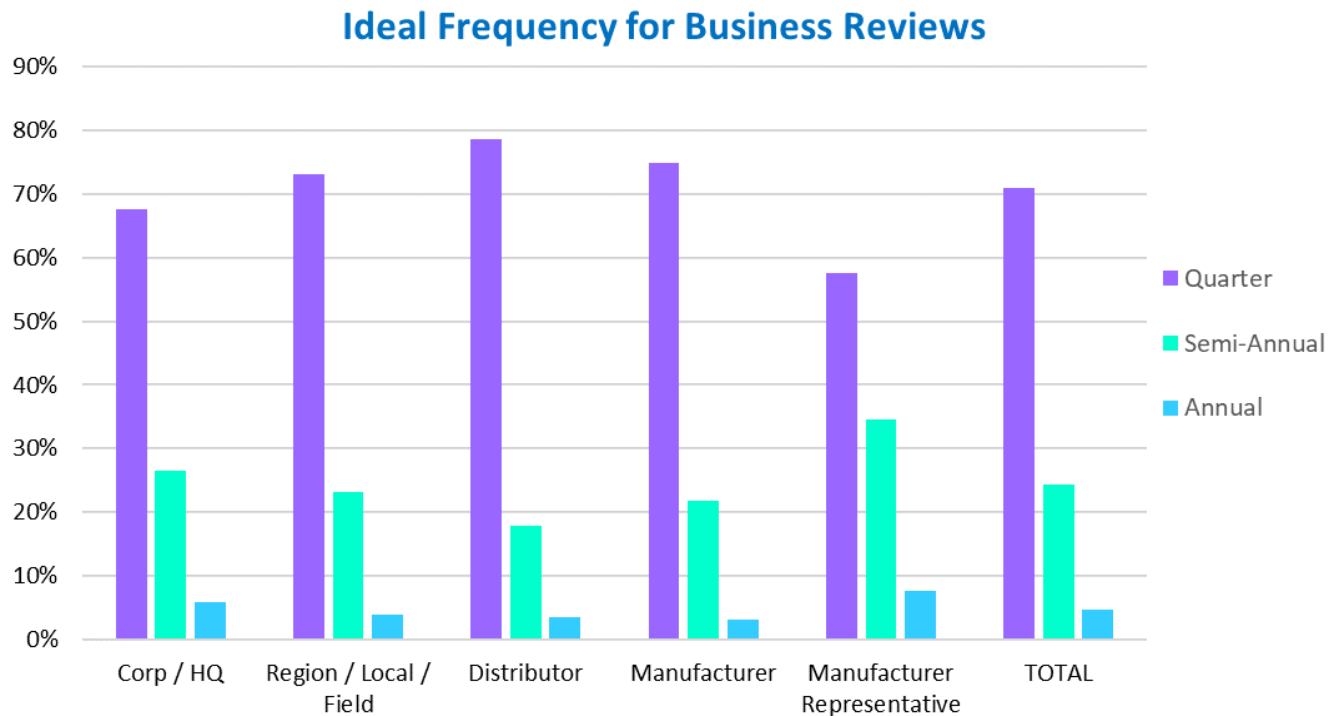
Total Participants = 86



GROUP	Number	Percent
Dist Corp/HQ	5	6%
Dist Region/Local	23	27%
Mfr Corp/HQ	17	20%
Mfr Region/Local	15	17%
Mfr Rep Corp/HQ	12	14%
Mfr Rep Region/Local	14	16%
Corp / HQ	34	40%
Region / Local / Field	52	60%
Distributor	28	33%
Manufacturer	32	37%
Manufacturer Rep	26	30%
TOTAL	86	

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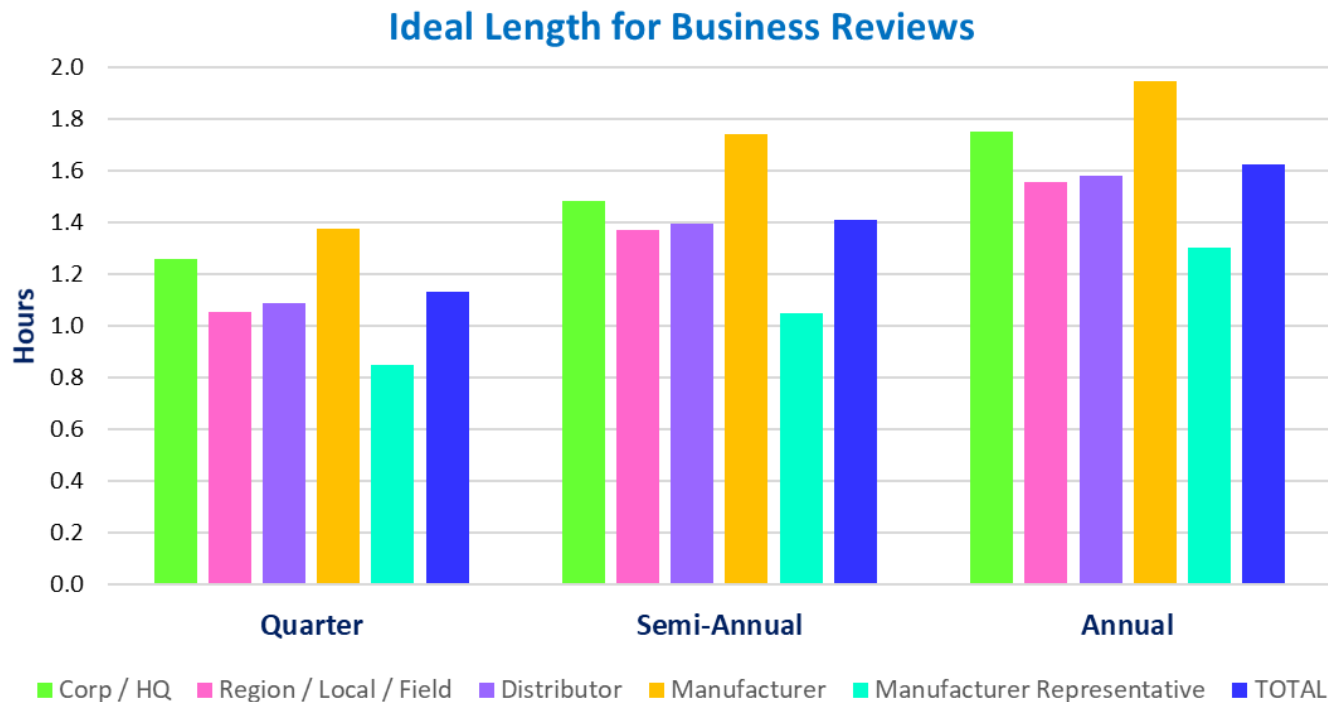
Frequency



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Length



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Frequency and Length Tables

Ideal frequency for business reviews?

LOCATION	PERCENTAGE			AVERAGE (per year)
	Quarter	Semi-Annual	Annual	
Corp / HQ	68%	26%	6%	3.3
Region / Local / Field	73%	23%	4%	3.4
Distributor	79%	18%	4%	3.5
Manufacturer	75%	22%	3%	3.5
Manufacturer Representative	58%	35%	8%	3.1
TOTAL	71%	24%	5%	3.4

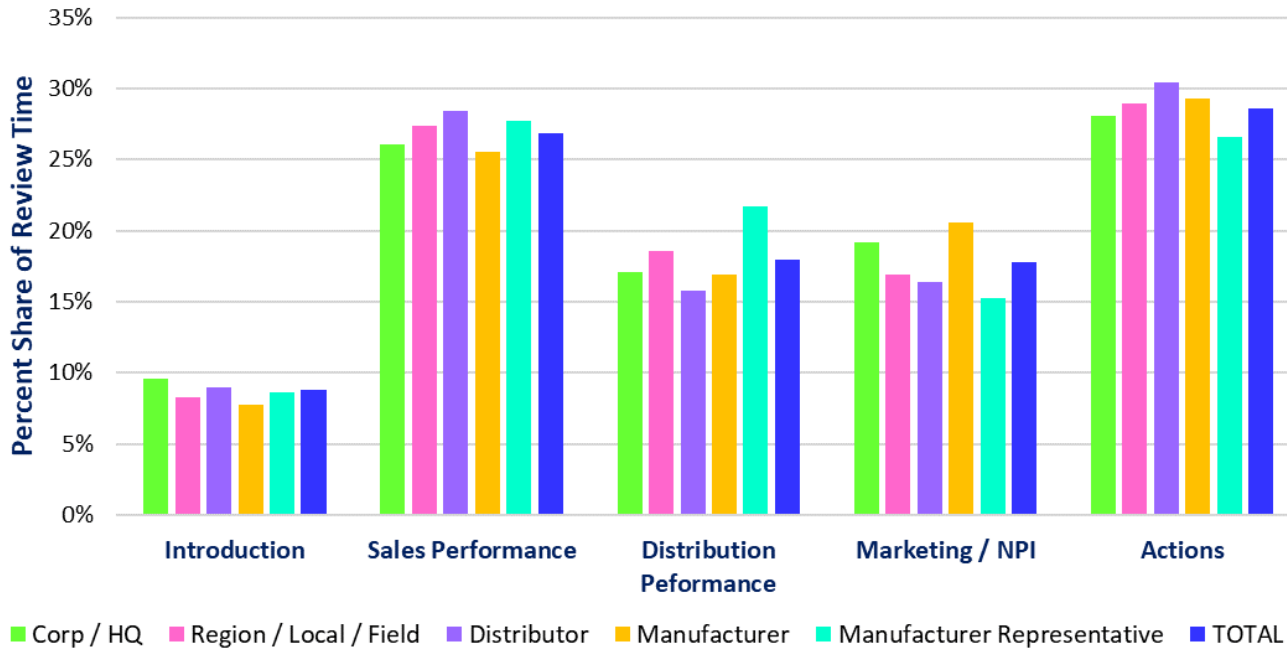
Ideal length for a review?

LOCATION	AVERAGE (Hours)		
	Quarter	Semi-Annual	Annual
Corp / HQ	1.26	1.48	1.75
Region / Local / Field	1.05	1.37	1.56
Distributor	1.09	1.40	1.58
Manufacturer	1.38	1.74	1.95
Manufacturer Representative	0.85	1.05	1.30
TOTAL	1.13	1.41	1.63

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Time Allocation

Preferred Time Allocation for Business Reviews



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Time Allocation Table

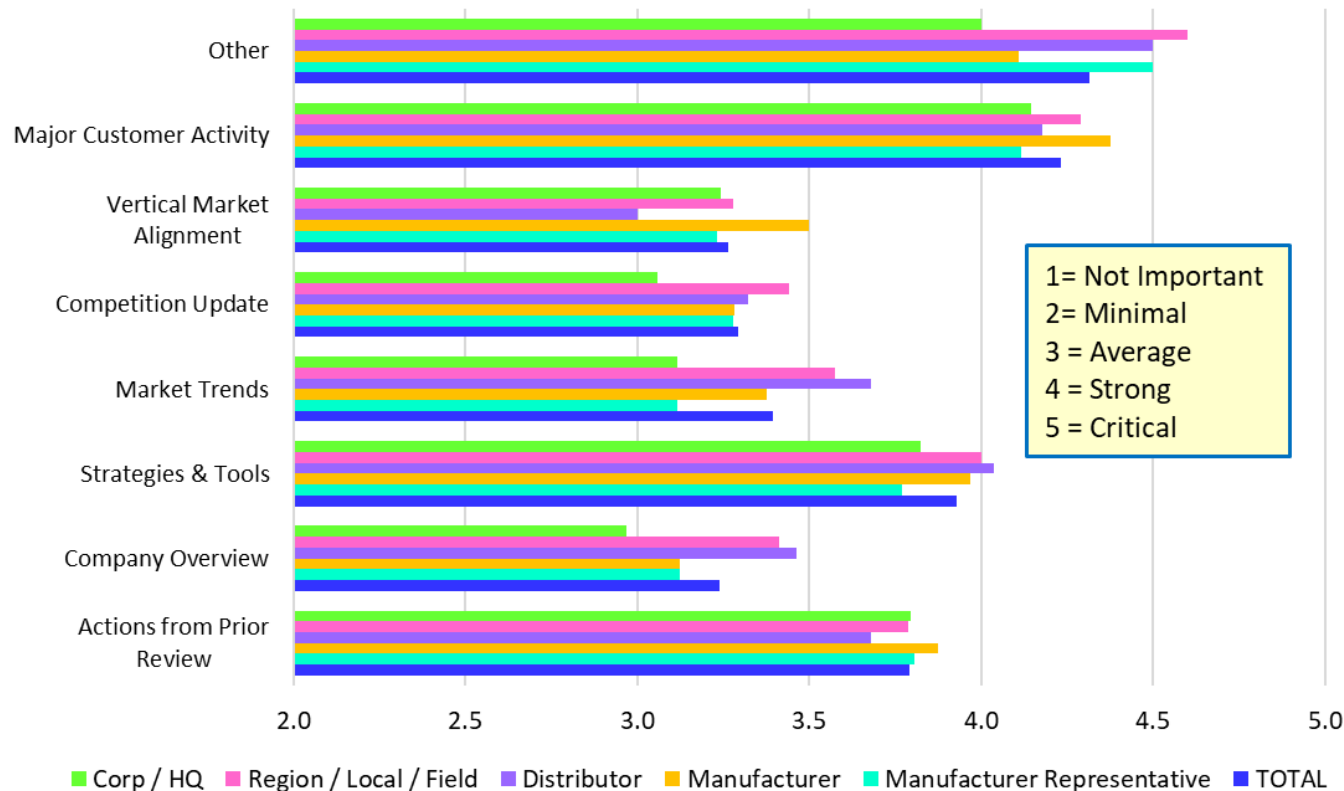
What percent of the review should be spent on each of these areas?

LOCATION	AVERAGE (% of Meeting)				
	Introduction	Sales Performance / KPI's / Funnel Review	Distribution Performance	Marketing / NPI	Actions (Target Accounts, Territory Visits, Opportunity Closure)
Corp / HQ	10%	26%	17%	19%	28%
Region / Local / Field	8%	27%	19%	17%	29%
Distributor	9%	28%	16%	16%	30%
Manufacturer	8%	26%	17%	21%	29%
Manufacturer Representative	9%	28%	22%	15%	27%
TOTAL	9%	27%	18%	18%	29%

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Introduction Item Importance

Importance of Introduction Elements



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Introduction Item Importance Table

Importance of these elements in the **Introduction** section?

ACTION	AVERAGE (1 to 5)					
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	TOTAL
Actions from prior review and any open items	3.8	3.8	3.7	3.9	3.8	3.8
Company Overview -state of the business including personnel updates and high level roadmaps (not a training)	3.0	3.4	3.5	3.1	3.1	3.2
Strategy & tools for success	3.8	4.0	4.0	4.0	3.8	3.9
Market trends	3.1	3.6	3.7	3.4	3.1	3.4
Competition update	3.1	3.4	3.3	3.3	3.3	3.3
Vertical market alignment (if needed)	3.2	3.3	3.0	3.5	3.2	3.3
Major Customer Activity - resourcing, business levels, moves in and out of the territory	4.1	4.3	4.2	4.4	4.1	4.2
Other - Please describe below	4.0	4.6	4.5	4.1	4.5	4.3

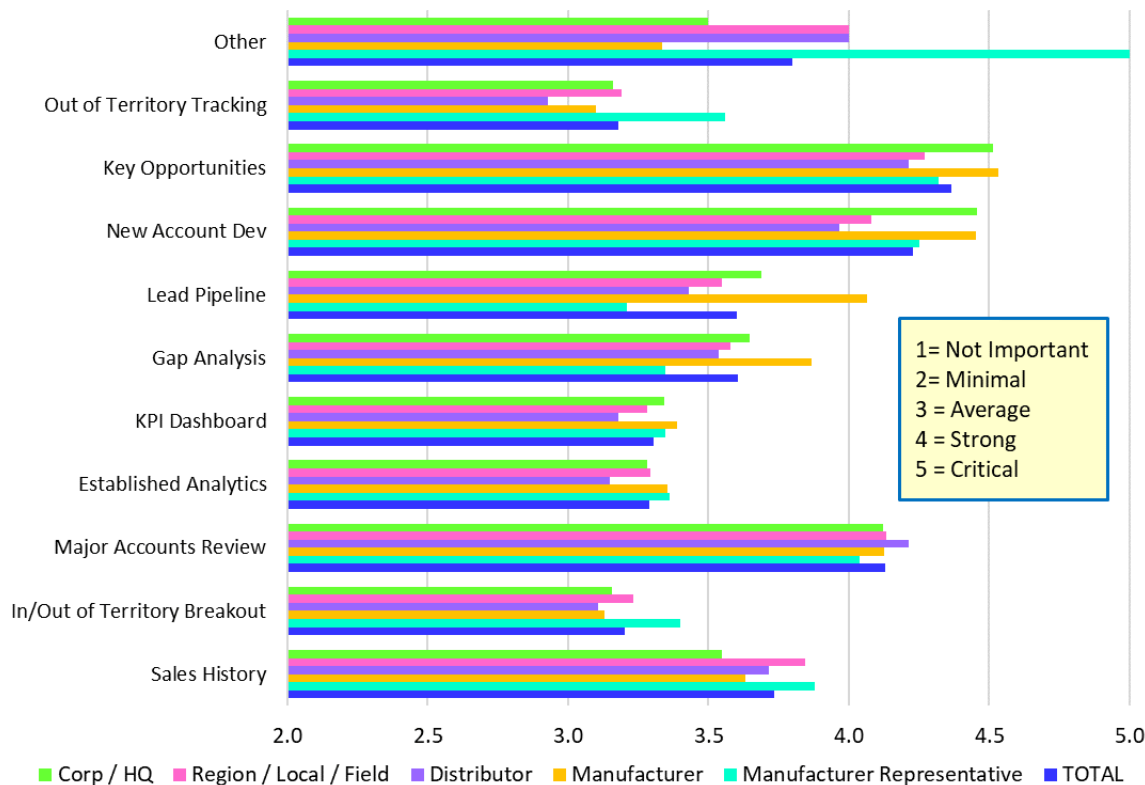
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Sales Performance / KPI / Funnel Review Item Importance

Importance of Sales Performance/KPI/ Funnel Review Elements



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Sales Performance / KPI / Funnel Review Item Importance Table

Importance of these elements in the **Sales Performance / KPI's / Funnel Review** section?

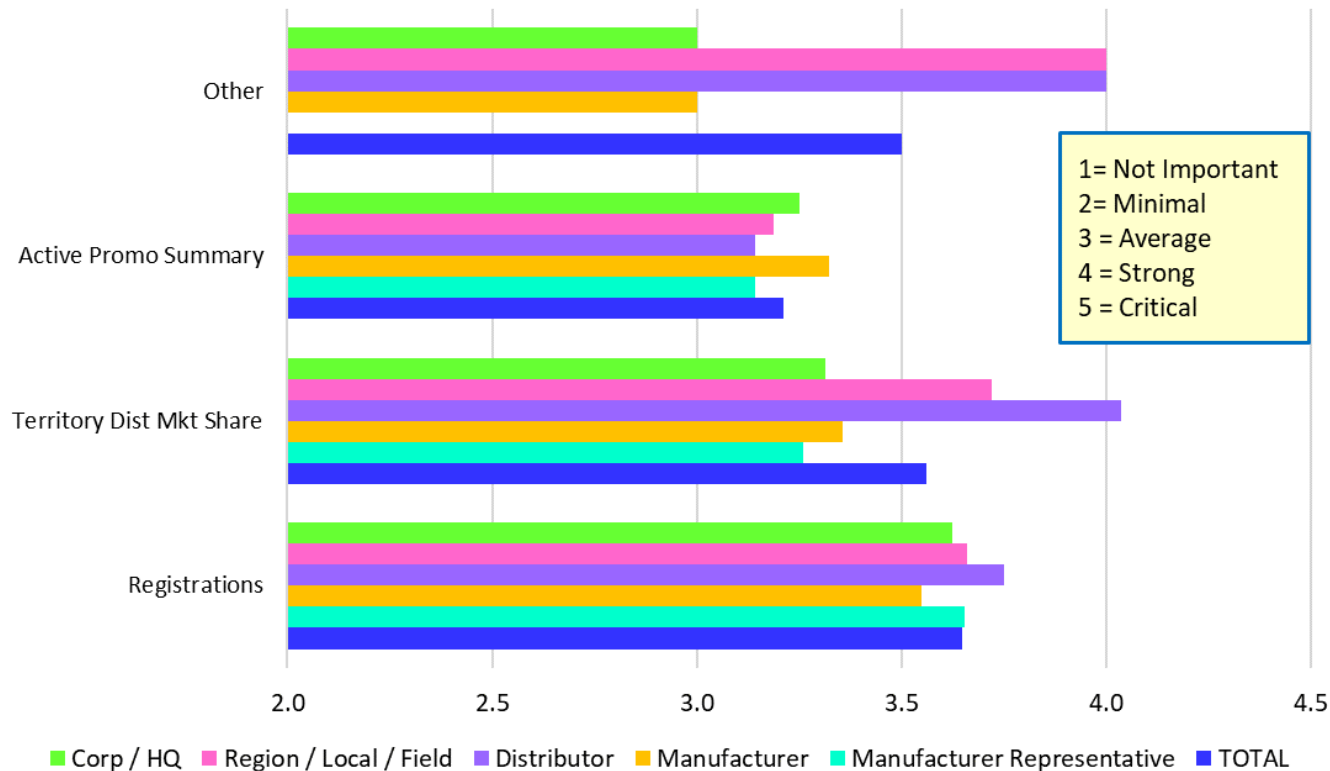
ACTION	AVERAGE (1 to 5)					TOTAL
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	
Sales History (Quarterly and Annually) rate on total sales performance	3.5	3.8	3.7	3.6	3.9	3.7
In territory and out of territory contribution breakout	3.2	3.2	3.1	3.1	3.4	3.2
Major down accounts review, as well as major up accounts (are these trends expected to continue thru year-end?) significant loss discussion	4.1	4.1	4.2	4.1	4.0	4.1
Established analytic views (example- Power BI) always available and updating real-time	3.3	3.3	3.1	3.4	3.4	3.3
KPI dashboard	3.3	3.3	3.2	3.4	3.3	3.3
Gap "whitespace" analysis of top accounts where products are not used yet	3.6	3.6	3.5	3.9	3.3	3.6
Review lead pipeline	3.7	3.5	3.4	4.1	3.2	3.6
New Account development	4.5	4.1	4.0	4.5	4.3	4.2
Key Opportunities (Funnel Discussion) and when expected to close	4.5	4.3	4.2	4.5	4.3	4.4
Out of territory tracking	3.2	3.2	2.9	3.1	3.6	3.2
Other - Please describe below	3.5	4.0	4.0	3.3	5.0	3.8

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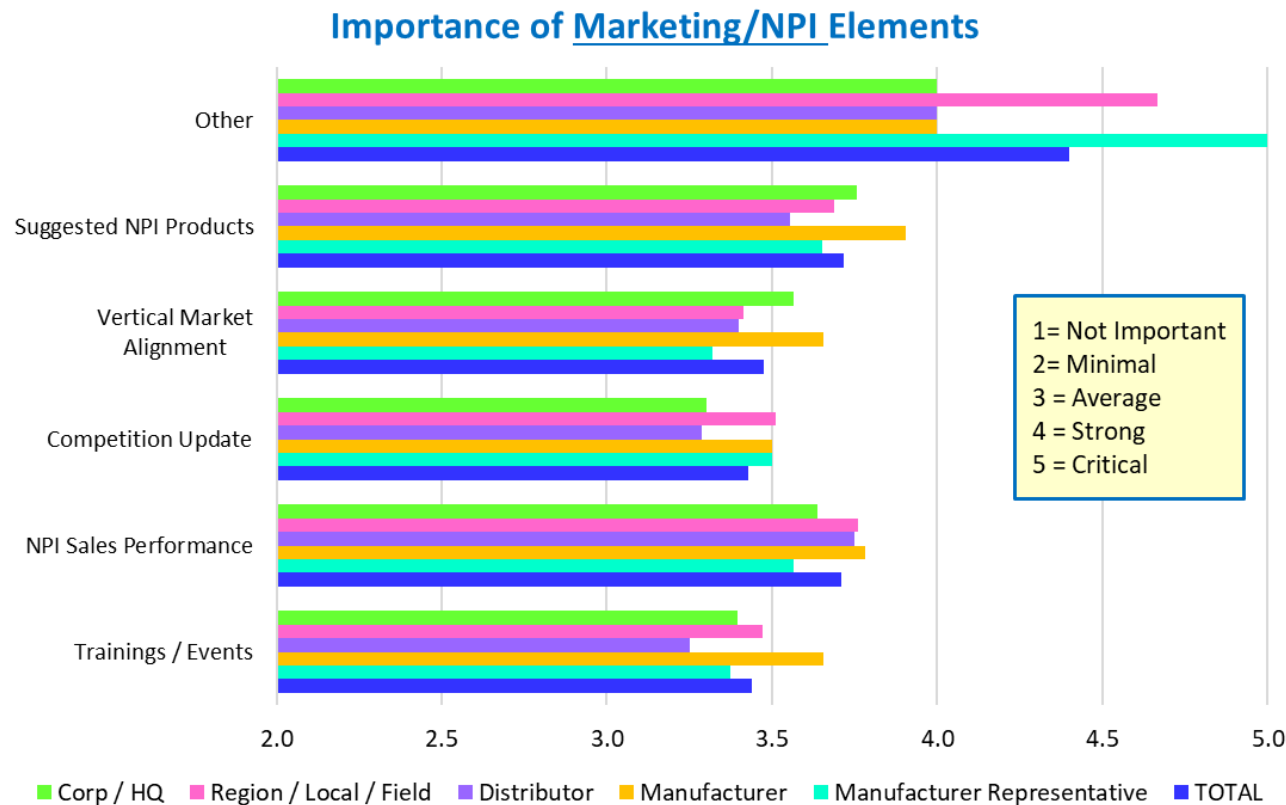
Distribution Item Importance

Importance of Distribution Elements



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Marketing/NPI Item Importance



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Distribution and Marketing/NPI Item Importance Tables

Important of these elements in the **Distribution** section?

ACTION	AVERAGE (1 to 5)					TOTAL
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	
Registrations - quantity, quality conversion revenue	3.6	3.7	3.8	3.5	3.7	3.6
Territory distribution market share	3.3	3.7	4.0	3.4	3.3	3.6
Active promo summary (corporate and local)	3.3	3.2	3.1	3.3	3.1	3.2
Other - Please describe below	3.0	4.0	4.0	3.0	NA	3.5

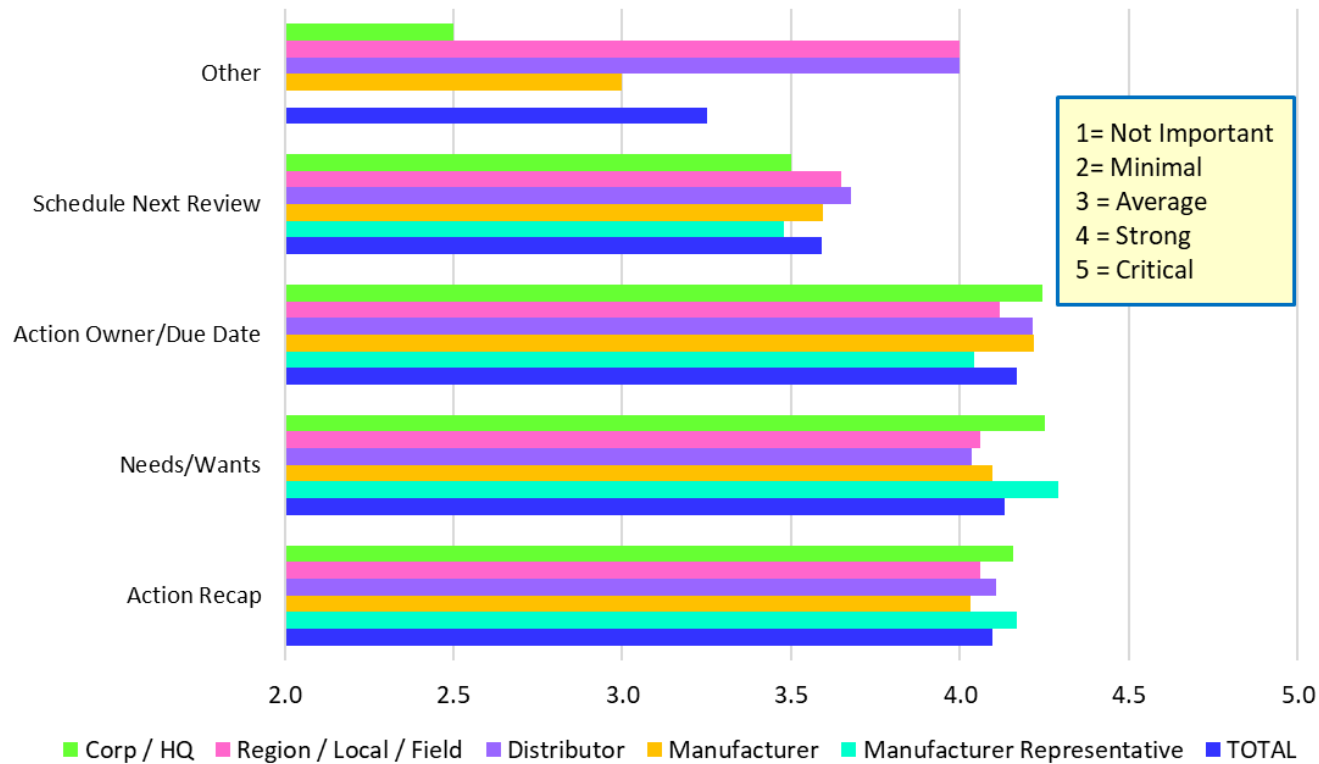
Importance of these elements in the **Marketing / NPI** section?

ACTION	AVERAGE (1 to 5)					TOTAL
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	
Scheduled trainings, other events (trade shows, disty events)	3.4	3.5	3.3	3.7	3.4	3.4
NPI sales performance / Availability and support	3.6	3.8	3.8	3.8	3.6	3.7
Competition update	3.3	3.5	3.3	3.5	3.5	3.4
Vertical market alignment (if needed)	3.6	3.4	3.4	3.7	3.3	3.5
Suggest needed product(s) for future NPI consideration based on competitive information and discussions with customer base	3.8	3.7	3.6	3.9	3.7	3.7
Other - Please describe below	4.0	4.7	4.0	4.0	5.0	4.4

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Actions & Wrap-up Item Importance

Importance of Actions & Wrap-up Elements



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Actions & Wrap-up Items Importance Table

Importance of these elements in the **Actions & Wrap-up** section?

ACTION	AVERAGE (1 to 5)					TOTAL
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	
Recap of actions from current review	4.2	4.1	4.1	4.0	4.2	4.1
Needs/Wants from multiple parties - Roadblocks/issues, escalation needs	4.3	4.1	4.0	4.1	4.3	4.1
Owner Action Items and Completion Dates	4.2	4.1	4.2	4.2	4.0	4.2
Schedule for next review	3.5	3.6	3.7	3.6	3.5	3.6
Other - Please describe below	2.5	4.0	4.0	3.0	NA	3.3

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Advance Preparation Word Cloud



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Top Goals Word Cloud



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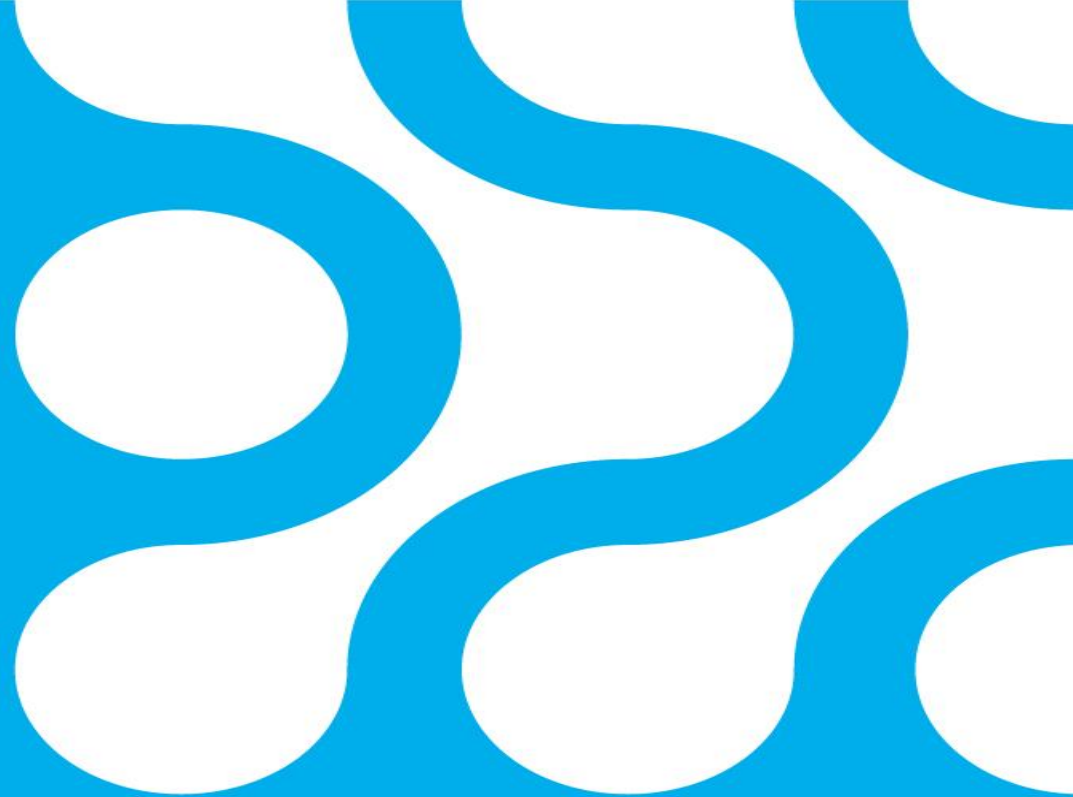
Discussion Elimination Word Cloud



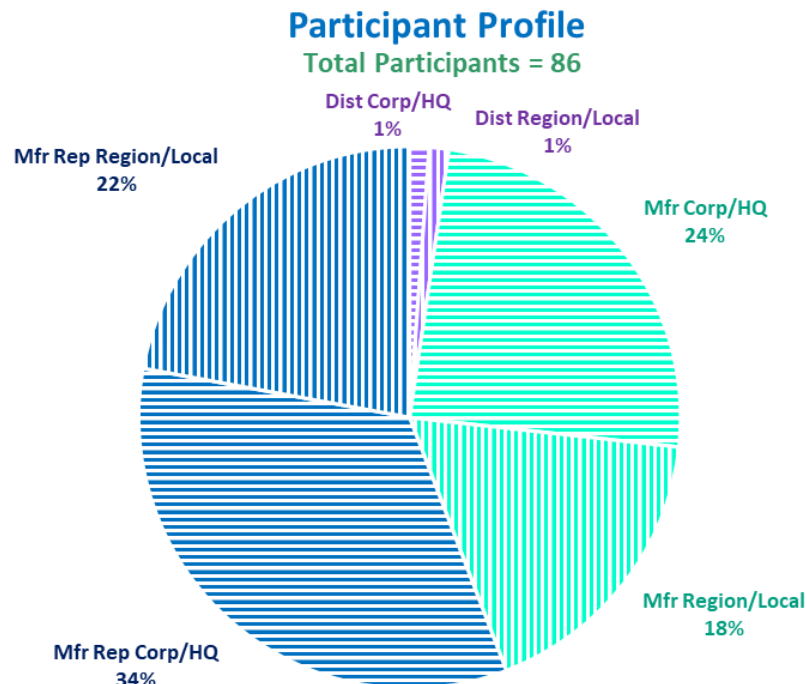
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**Manufacturer's
Representative with
Manufacturer Review**



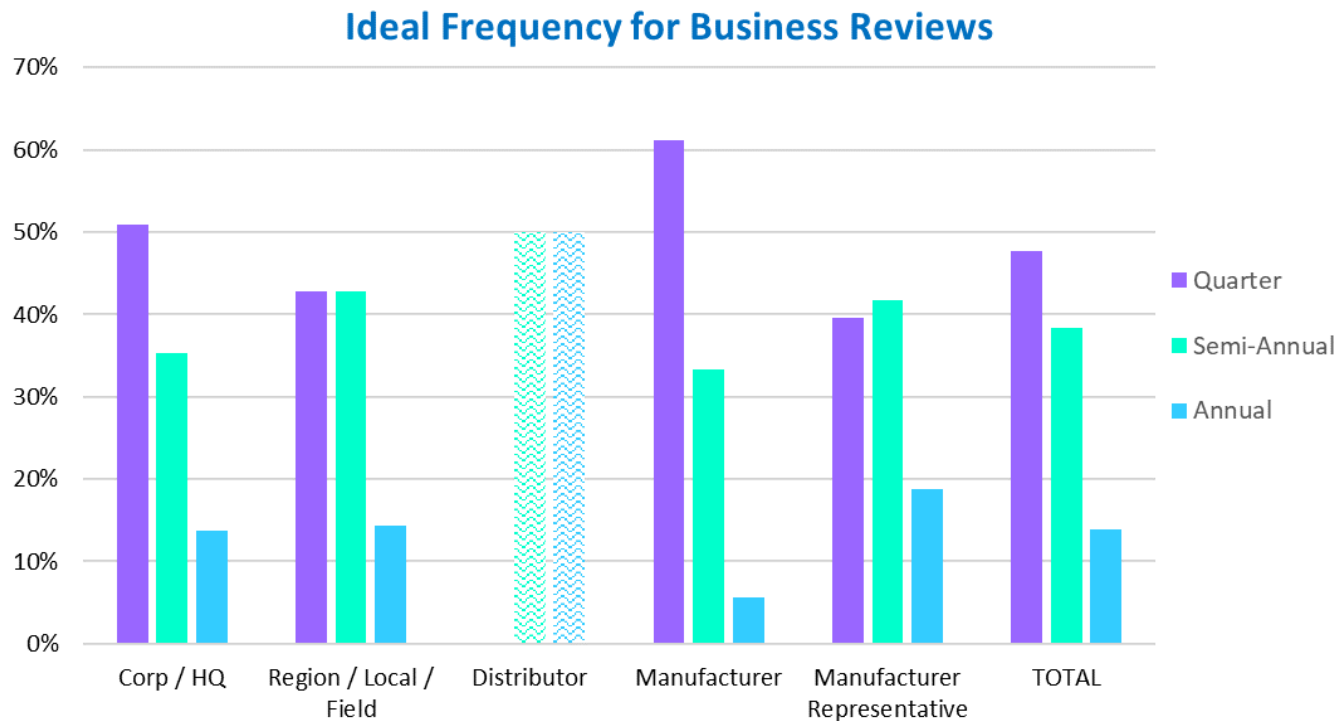
Manufacturer's Representative with Manufacturer



GROUP	Number	Percent
Dist Corp/HQ	1	1%
Dist Region/Local	1	1%
Mfr Corp/HQ	21	24%
Mfr Region/Local	15	17%
Mfr Rep Corp/HQ	29	34%
Mfr Rep Region/Local	19	22%
Corp / HQ	51	59%
Region / Local / Field	35	41%
Distributor	2	2%
Manufacturer	36	42%
Manufacturer Rep	48	56%
TOTAL	86	

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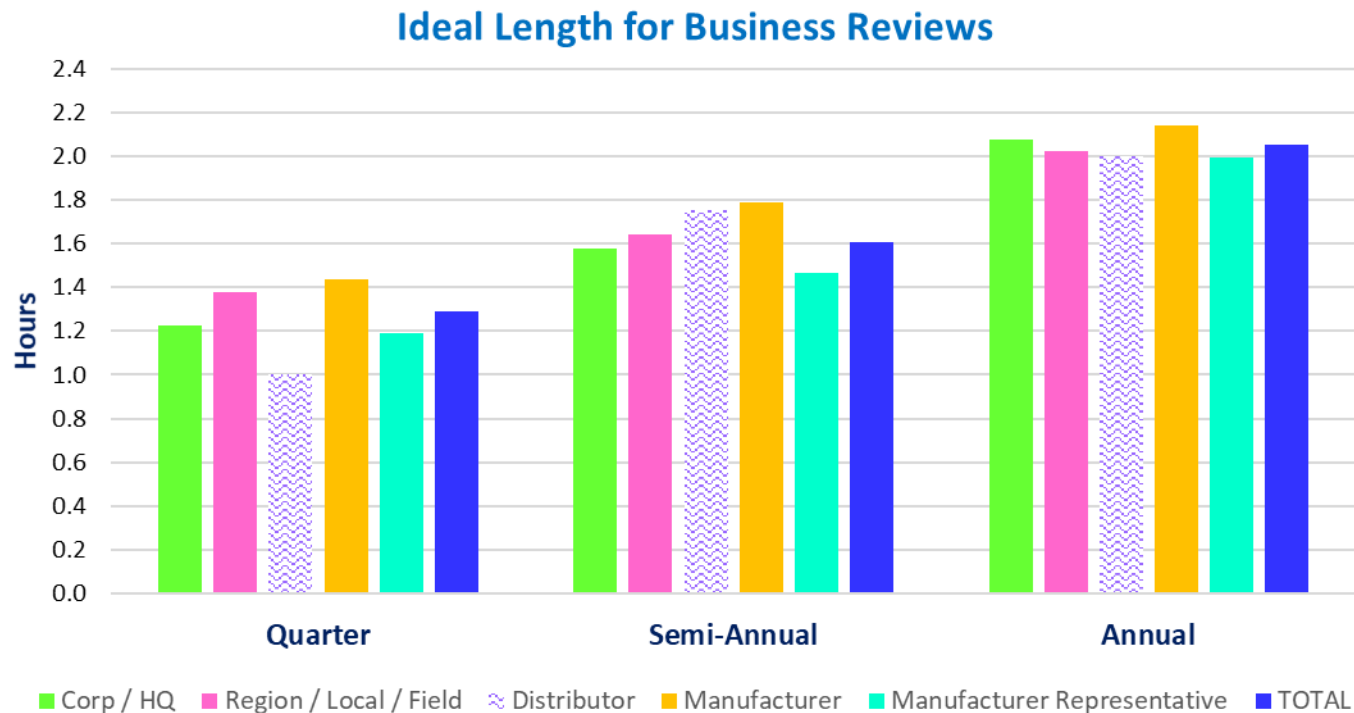
Frequency



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Length



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Frequency and Length Tables

Ideal frequency for business reviews?

LOCATION	PERCENTAGE			AVERAGE (per year)
	Quarter	Semi-Annual	Annual	
Corp / HQ	51%	35%	14%	2.9
Region / Local / Field	43%	43%	14%	2.7
Distributor	0%	50%	50%	1.5
Manufacturer	61%	33%	6%	3.2
Manufacturer Representative	40%	42%	19%	2.6
TOTAL	48%	38%	14%	2.8

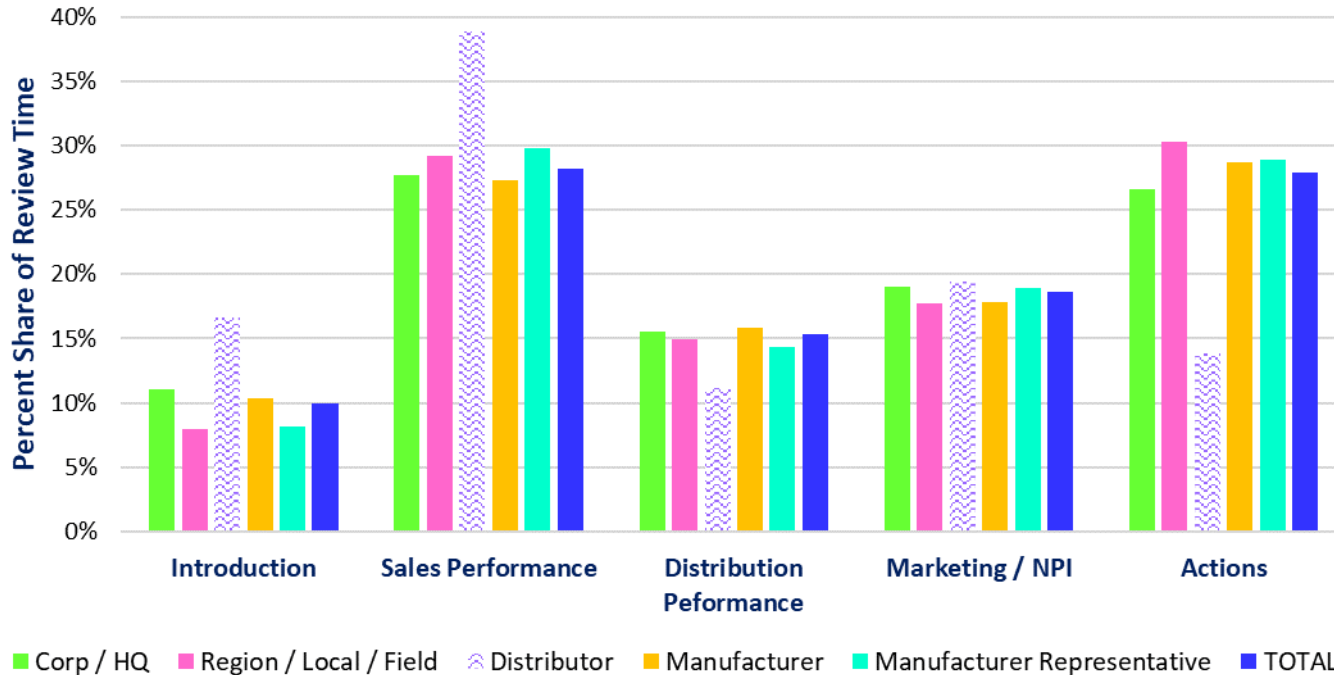
Ideal length for a review?

LOCATION	AVERAGE (Hours)		
	Quarter	Semi-Annual	Annual
Corp / HQ	1.22	1.57	2.08
Region / Local / Field	1.38	1.64	2.02
Distributor	1.00	1.75	2.00
Manufacturer	1.43	1.79	2.14
Manufacturer Representative	1.19	1.47	1.99
TOTAL	1.29	1.60	2.05

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Time Allocation

Preferred Time Allocation for Business Reviews



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Time Allocation Table

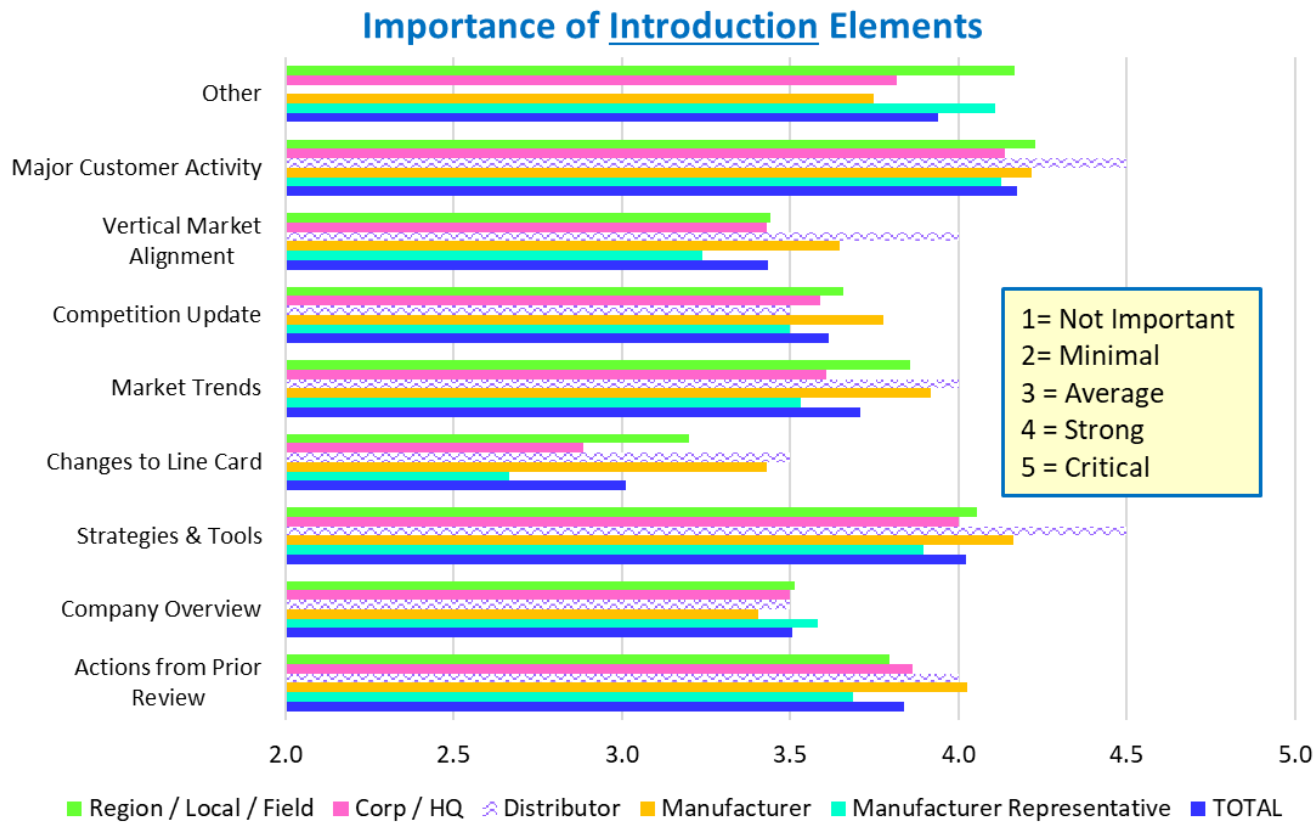
What percent of the review should be spent on each of these areas?

LOCATION	AVERAGE (% of Meeting)				
	Introduction	Sales Performance / KPI's / Funnel Review	Distribution Performance	Marketing / NPI	Actions (Target Accounts, Territory Visits, Opportunity Closure)
Corp / HQ	11%	28%	16%	19%	27%
Region / Local / Field	8%	29%	15%	18%	30%
Distributor	17%	39%	11%	19%	14%
Manufacturer	10%	27%	16%	18%	29%
Manufacturer Representative	8%	30%	14%	19%	29%
TOTAL	10%	28%	15%	19%	28%

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Introduction Item Importance



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Introduction Item Importance Table

Importance of these elements in the **Introduction** section?

ACTION	AVERAGE (1 to 5)					TOTAL
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	
Actions from prior review and any open items	3.9	3.8	4.0	4.0	3.7	3.8
Company Overview -state of the business including personnel updates and high level roadmaps (not a training)	3.5	3.5	3.5	3.4	3.6	3.5
Strategy & tools for success	4.0	4.1	4.5	4.2	3.9	4.0
Changes to line card presented	2.9	3.2	3.5	3.4	2.7	3.0
Market trends	3.6	3.9	4.0	3.9	3.5	3.7
Competition update	3.6	3.7	3.5	3.8	3.5	3.6
Vertical market alignment (if needed)	3.4	3.4	4.0	3.6	3.2	3.4
Major Customer Activity - resourcing, business levels, moves in and out of the territory	4.1	4.2	4.5	4.2	4.1	4.2
Other - Please describe below	3.8	4.2	0.0	3.8	4.1	3.9

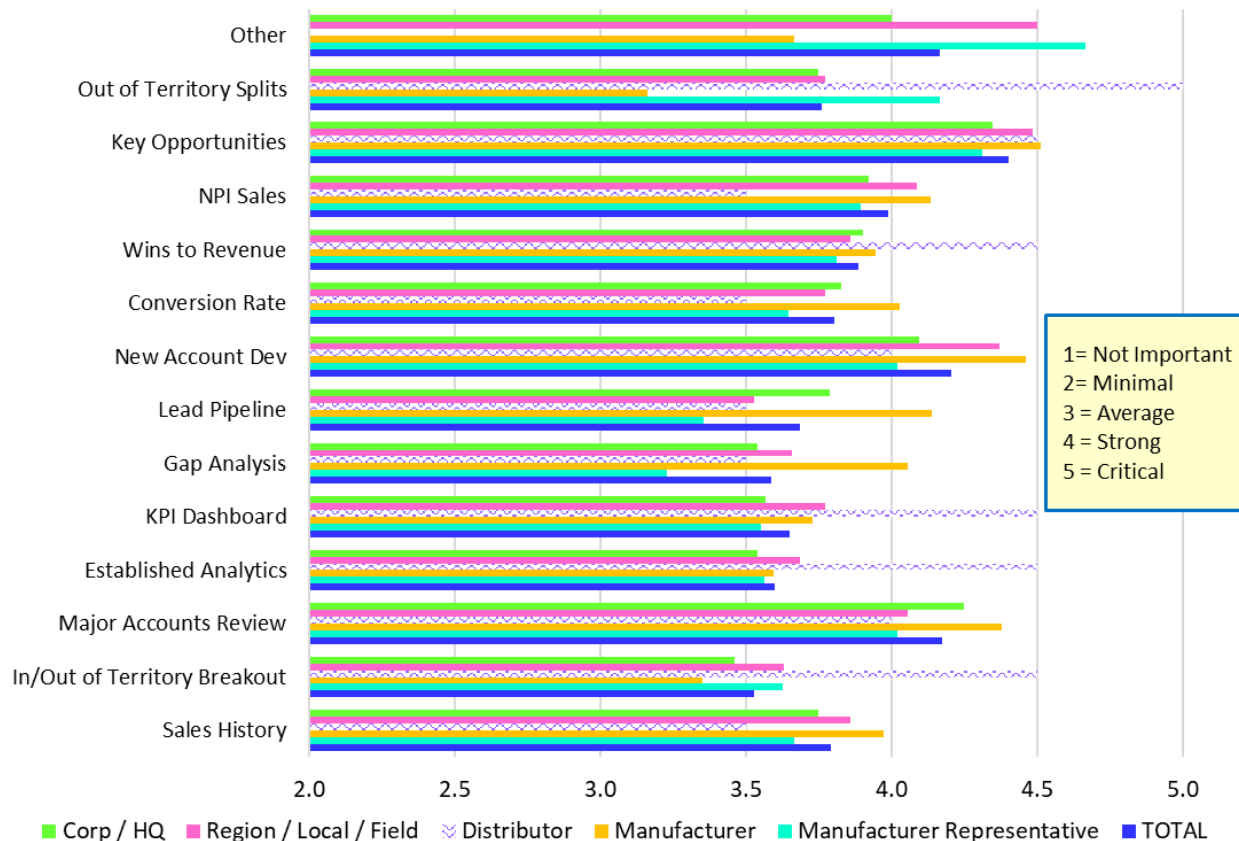
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Sales Performance / KPI / Funnel Review Item Importance

Importance of Sales Performance/KPI/ Funnel Review Elements



Sales Performance / KPI / Funnel Review Item Importance Table

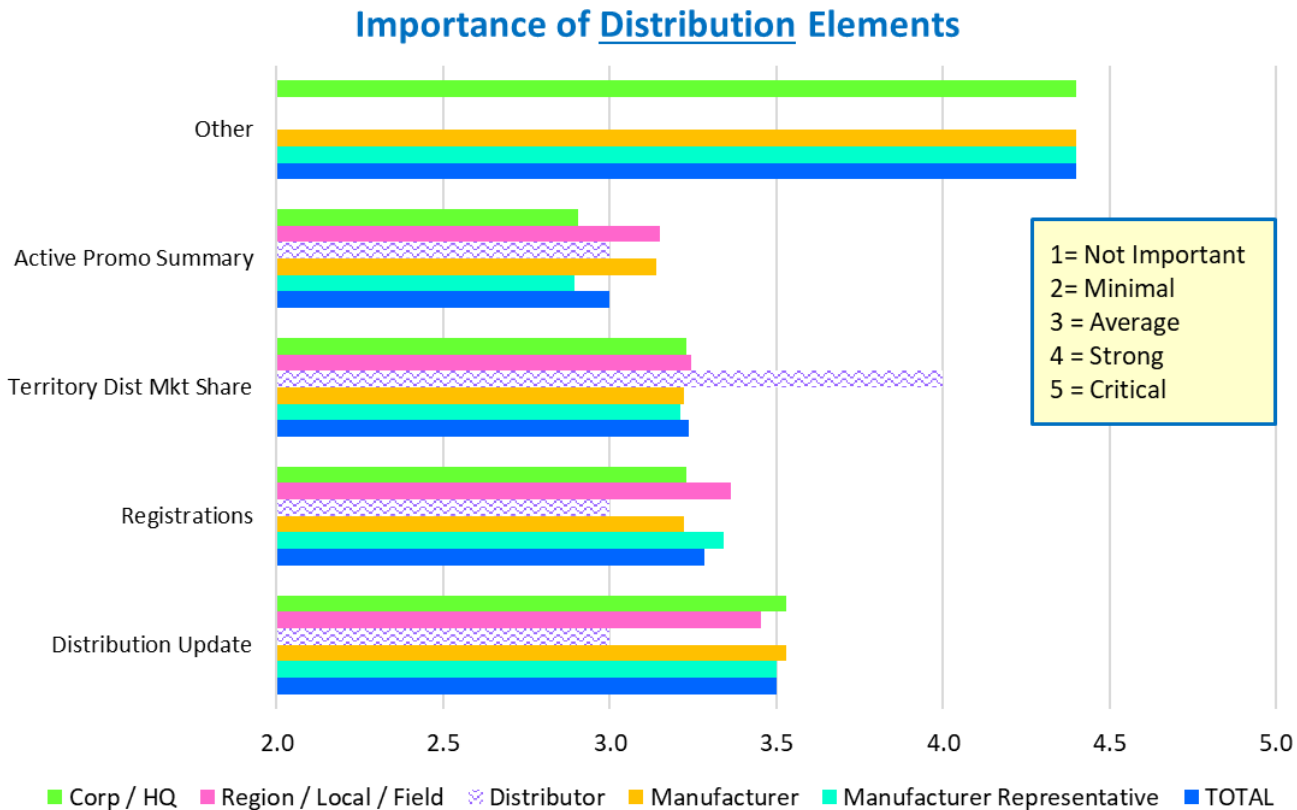
Importance of these elements in the **Sales Performance / KPI's / Funnel Review** section?

ACTION	AVERAGE (1 to 5)					
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	TOTAL
Sales History (Quarterly and Annually) rate on total sales performance	3.8	3.9	3.5	4.0	3.7	3.8
In territory and out of territory contribution breakout	3.5	3.6	4.5	3.4	3.6	3.5
Major down accounts review, as well as major up accounts (are these trends expected to continue thru year-end?) significant loss discussion	4.3	4.1	4.0	4.4	4.0	4.2
Established analytic views (example- Power BI) always available and updating real-time	3.5	3.7	4.5	3.6	3.6	3.6
KPI dashboard	3.6	3.8	4.5	3.7	3.6	3.7
Gap "whitespace" analysis of top accounts where products are not used yet	3.5	3.7	3.5	4.1	3.2	3.6
Review lead pipeline	3.8	3.5	3.5	4.1	3.4	3.7
New account development	4.1	4.4	4.0	4.5	4.0	4.2
Conversion rate - opportunities to wins	3.8	3.8	3.5	4.0	3.6	3.8
Wins to revenue discussion - impact to forecast	3.9	3.9	4.5	3.9	3.8	3.9
NPI sales discussion	3.9	4.1	3.5	4.1	3.9	4.0
Key Opportunities (Funnel Discussion) and when expected to close	4.3	4.5	4.5	4.5	4.3	4.4
Out of territory split commission reconciliation	3.8	3.8	5.0	3.2	4.2	3.8
Other - Please describe below	4.0	4.5	0.0	3.7	4.7	4.2

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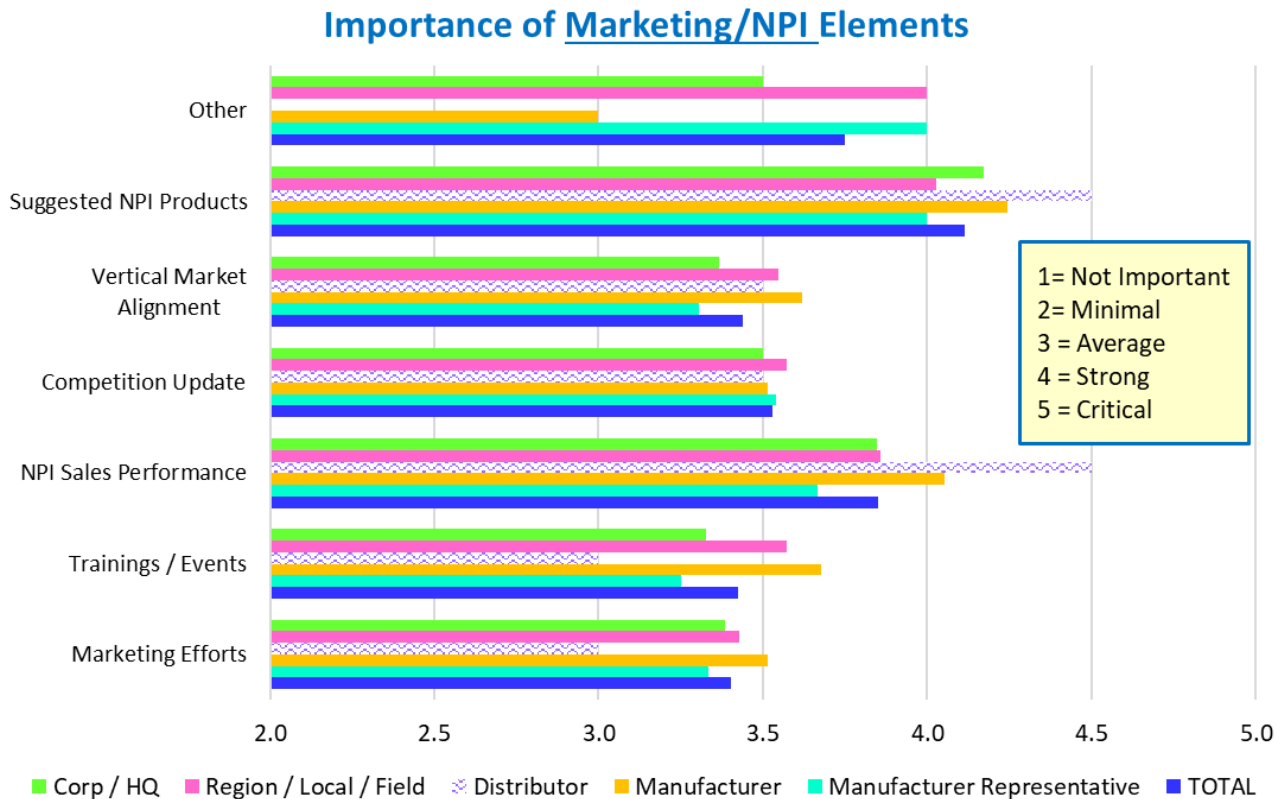

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Distribution Item Importance



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Marketing/NPI Item Importance



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Distribution and Marketing/NPI Item Importance Tables

Important of these elements in the **Distribution** section?

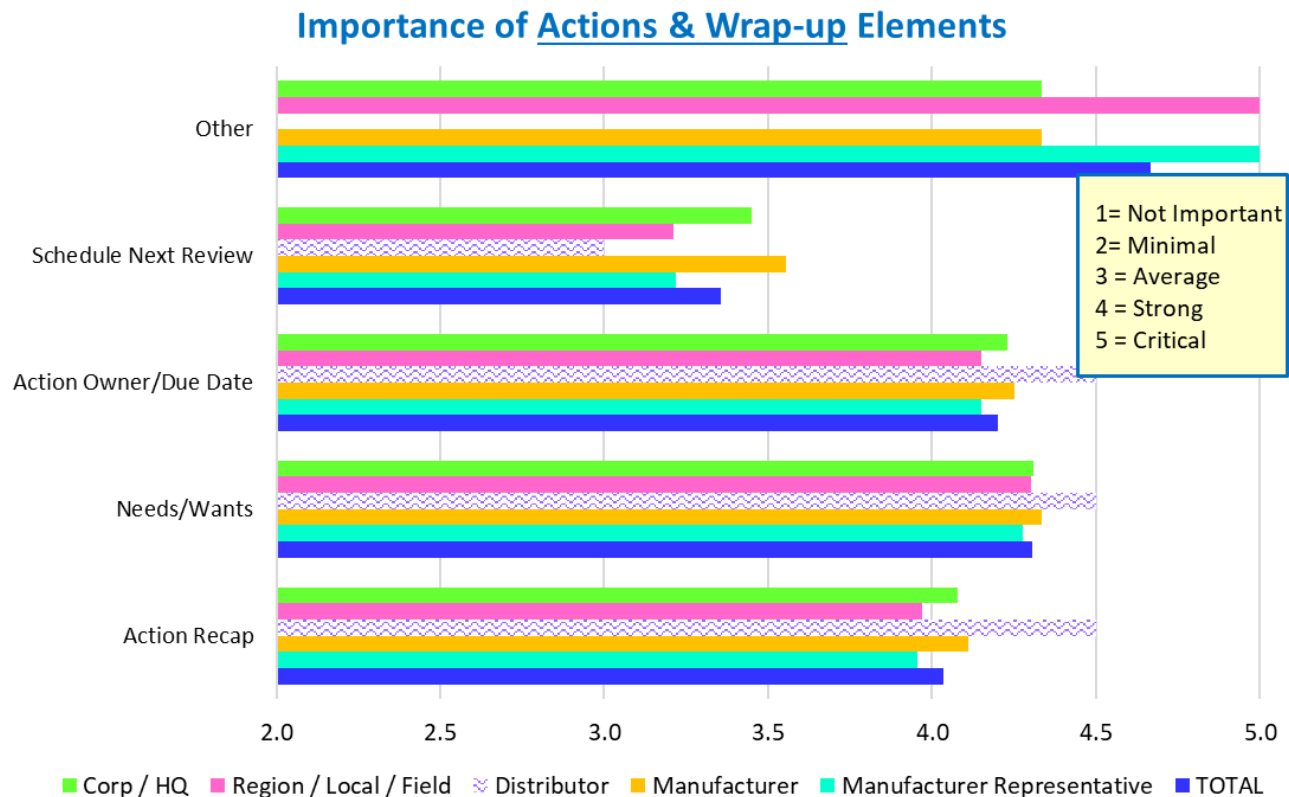
ACTION	AVERAGE (1 to 5)					
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	TOTAL
Distribution update by Rep	3.5	3.5	3.0	3.5	3.5	3.5
Registrations - quantity, quality conversion revenue	3.2	3.4	3.0	3.2	3.3	3.3
Territory distribution market share	3.2	3.2	4.0	3.2	3.2	3.2
Active promo summary (corporate and local)	2.9	3.2	3.0	3.1	2.9	3.0
Other - Please describe below	4.4	NA	0.0	4.4	4.4	4.4

Importance of these elements in the **Marketing / NPI** section?

ACTION	AVERAGE (1 to 5)					
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	TOTAL
Marketing efforts - Social media, advertisements, etc.	3.4	3.4	3.0	3.5	3.3	3.4
Scheduled trainings, other events (trade shows, disty events)	3.3	3.6	3.0	3.7	3.3	3.4
NPI sales performance / Availability and support	3.8	3.9	4.5	4.1	3.7	3.9
Competition update	3.5	3.6	3.5	3.5	3.5	3.5
Vertical market alignment (if needed)	3.4	3.5	3.5	3.6	3.3	3.4
Suggest needed product(s) for future NPI consideration based on competitive information and discussions with customer base	4.2	4.0	4.5	4.2	4.0	4.1
Other - Please describe below	3.5	4.0	0.0	3.0	4.0	3.8

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Actions & Wrap-up Item Importance



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Actions & Wrap-up Items Importance Table

Importance of these elements in the **Actions & Wrap-up** section?

ACTION	AVERAGE (1 to 5)					TOTAL
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	
Recap of actions from current review	4.1	4.0	4.5	4.1	4.0	4.0
Needs/Wants from multiple parties - Roadblocks/issues, escalation needs	4.3	4.3	4.5	4.3	4.3	4.3
Owner Action Items and Completion Dates	4.2	4.2	4.5	4.3	4.1	4.2
Schedule for next review	3.5	3.2	3.0	3.6	3.2	3.4
Other - Please describe below	4.3	5.0	0.0	4.3	5.0	4.7

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Advance Preparation Word Cloud



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Top Goals Word Cloud



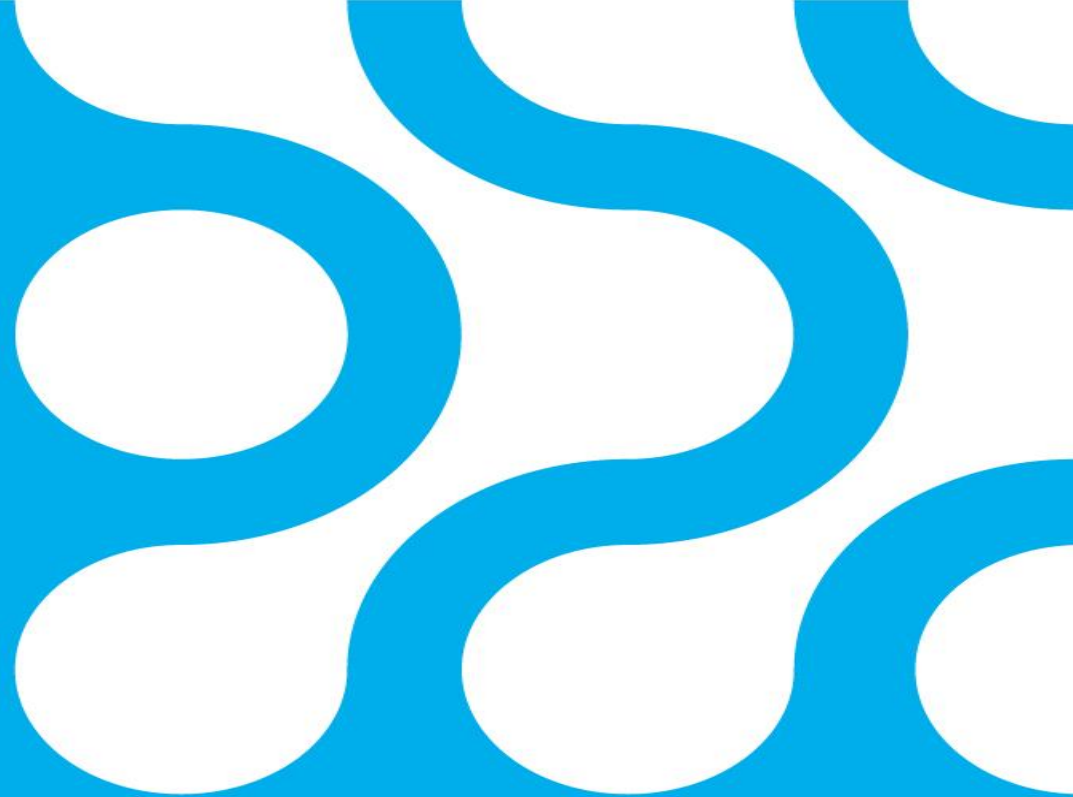
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Discussion Elimination Word Cloud

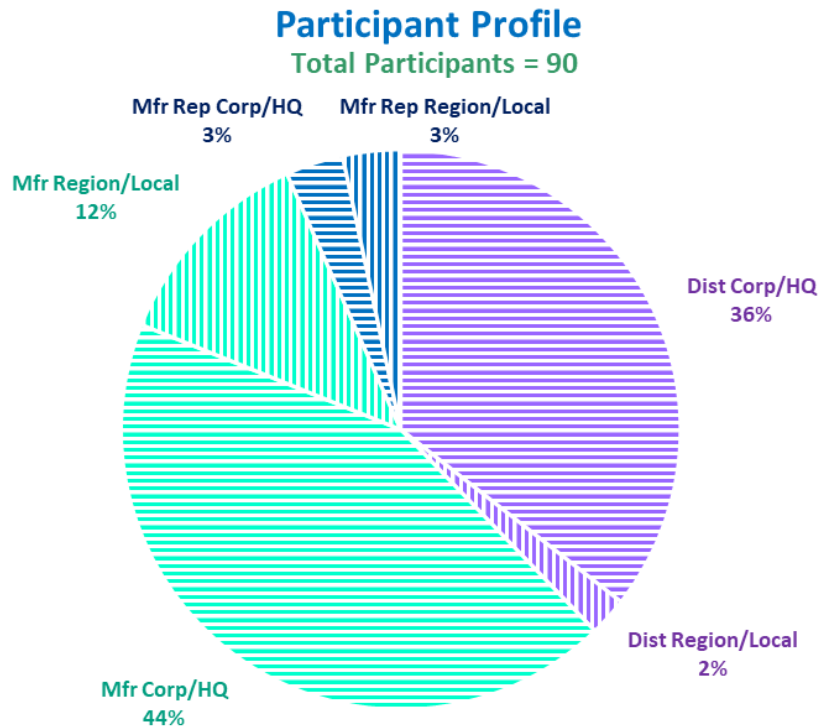


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**Corporate - Distribution
with Manufacturer Review**



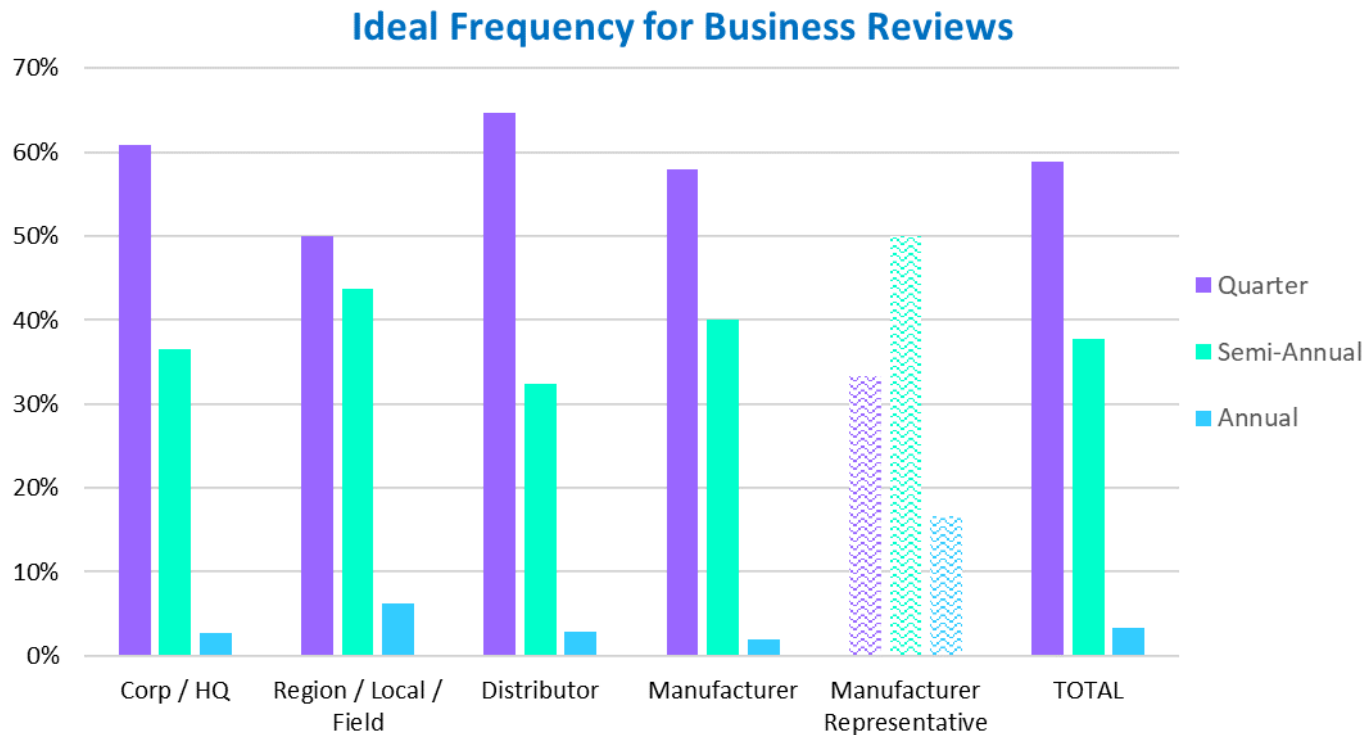
Corporate - Distribution with Manufacturer



GROUP	Number	Percent
Dist Corp/HQ	32	36%
Dist Region/Local	2	2%
Mfr Corp/HQ	39	43%
Mfr Region/Local	11	12%
Mfr Rep Corp/HQ	3	3%
Mfr Rep Region/Local	3	3%
Corp / HQ		82%
Region / Local / Field		18%
Distributor	34	38%
Manufacturer	50	56%
Manufacturer Rep	6	7%
TOTAL	90	

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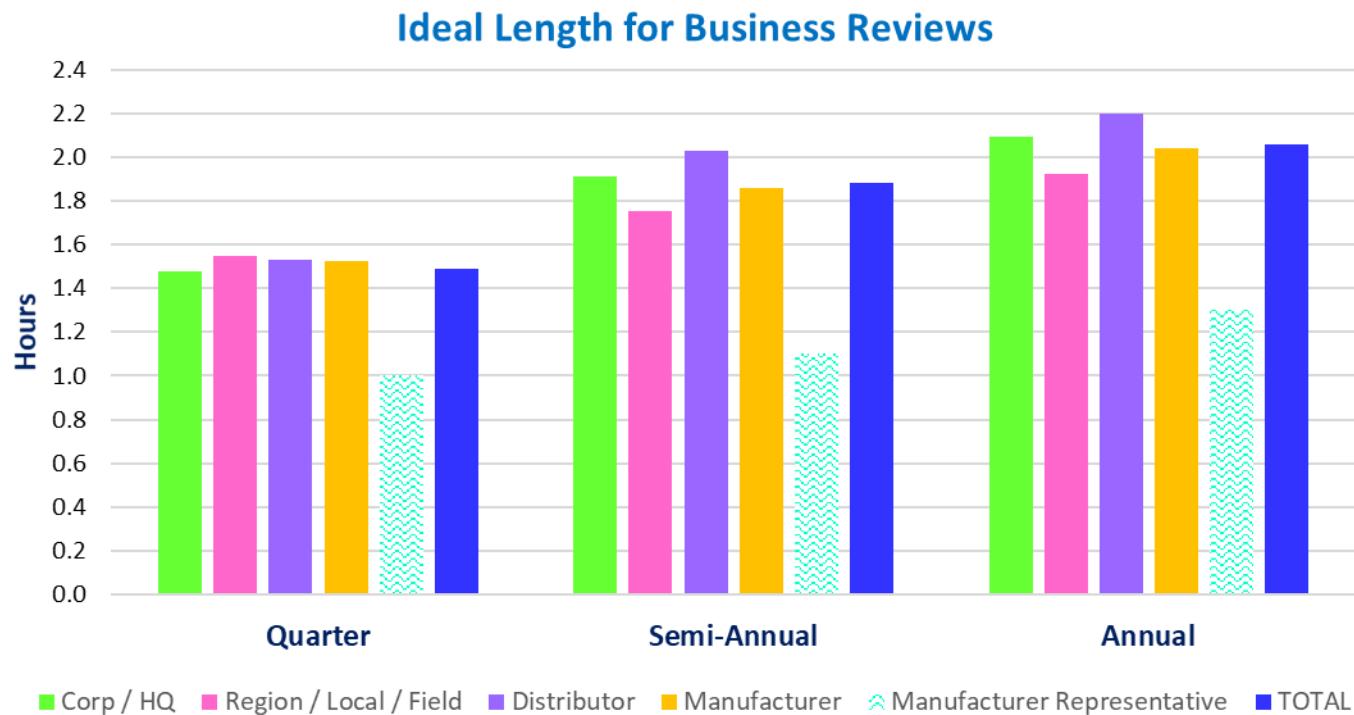
Frequency



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Length



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Frequency and Length Tables

Ideal frequency for business reviews?

LOCATION	PERCENTAGE			AVERAGE (per year)
	Quarter	Semi-Annual	Annual	
Corp / HQ	61%	36%	3%	3.2
Region / Local / Field	50%	44%	6%	2.9
Distributor	65%	32%	3%	3.3
Manufacturer	58%	40%	2%	3.1
Manufacturer Representative	33%	50%	17%	2.5
TOTAL	59%	38%	3%	3.1

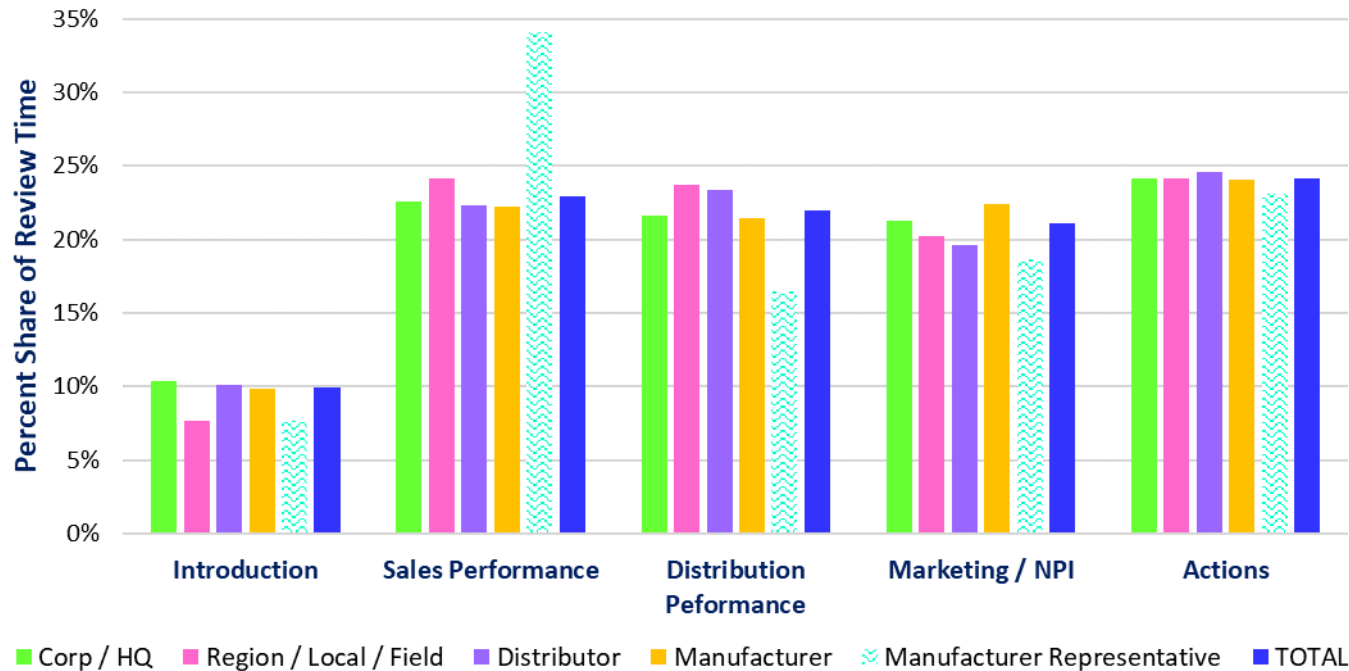
Ideal length for a review?

LOCATION	AVERAGE (Hours)		
	Quarter	Semi-Annual	Annual
Corp / HQ	1.48	1.91	2.09
Region / Local / Field	1.55	1.75	1.92
Distributor	1.53	2.03	2.20
Manufacturer	1.53	1.86	2.04
Manufacturer Representative	1.00	1.10	1.30
TOTAL	1.49	1.88	2.06

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Time Allocation

Preferred Time Allocation for Business Reviews



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Time Allocation Table

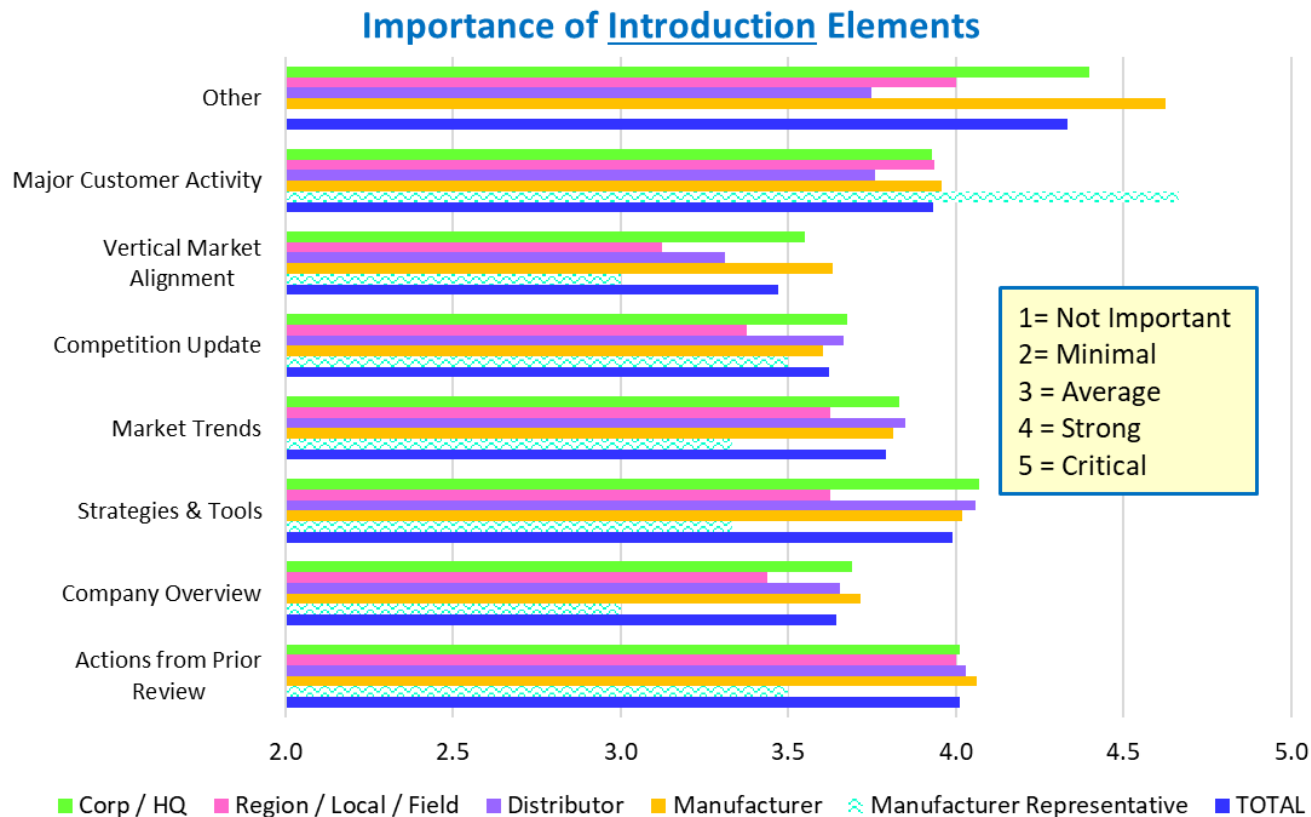
What percent of the review should be spent on each of these areas?

LOCATION	AVERAGE (% of Meeting)				
	Introduction	Sales Performance / KPI's / Funnel Review	Distribution Performance	Marketing / NPI	Actions (Target Accounts, Territory Visits, Opportunity Closure)
Corp / HQ	10%	23%	22%	21%	24%
Region / Local / Field	8%	24%	24%	20%	24%
Distributor	10%	22%	23%	20%	25%
Manufacturer	10%	22%	21%	22%	24%
Manufacturer Representative	8%	34%	16%	19%	23%
TOTAL	10%	23%	22%	21%	24%

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Introduction Item Importance



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Introduction Item Importance Table

Importance of these elements in the **Introduction** section?

ACTION	AVERAGE (1 to 5)					
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	TOTAL
Actions from prior review and any open items	4.0	4.0	4.0	4.1	3.5	4.0
Company Overview -state of the business including personnel updates and high level roadmaps (not a training)	3.7	3.4	3.7	3.7	3.0	3.6
Strategy & tools for success	4.1	3.6	4.1	4.0	3.3	4.0
Market trends	3.8	3.6	3.8	3.8	3.3	3.8
Competition update	3.7	3.4	3.7	3.6	3.5	3.6
Vertical market alignment (if needed)	3.5	3.1	3.3	3.6	3.0	3.5
Major Customer Activity - resourcing, business levels, moves in and out of the territory	3.9	3.9	3.8	4.0	4.7	3.9
Other - Please describe below	4.4	4.0	3.8	4.6	NA	4.3

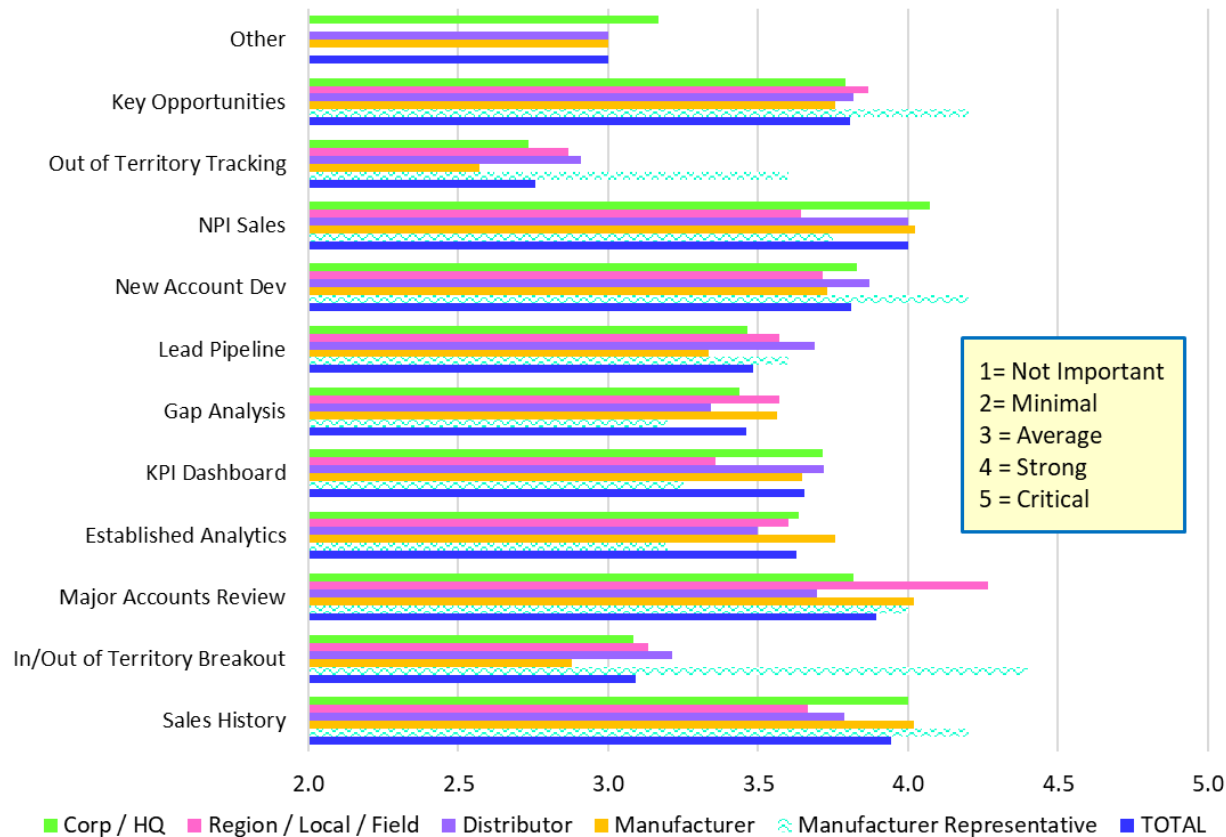
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Sales Performance / KPI / Funnel Review Item Importance

Importance of Sales Performance/KPI/ Funnel Review Elements



Sales Performance / KPI / Funnel Review Item Importance Table

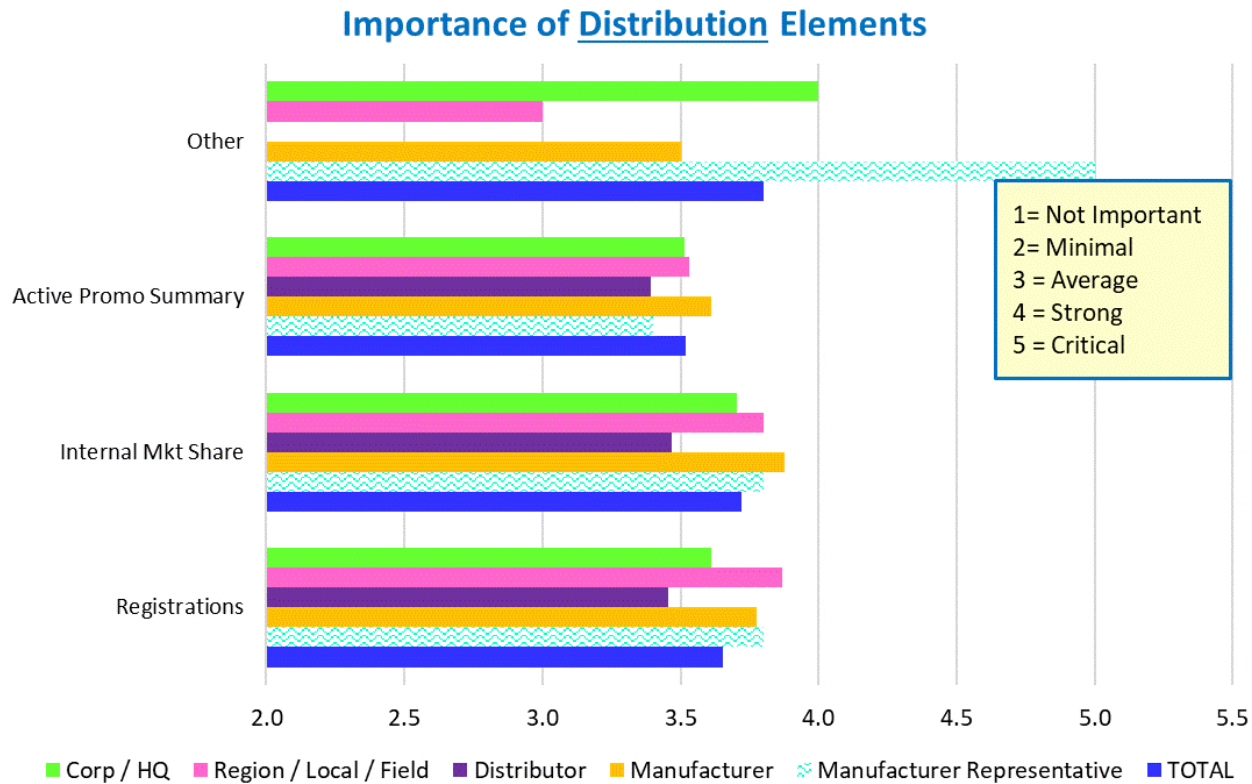
Importance of these elements in the **Sales Performance / KPI's / Funnel Review** section?

ACTION	AVERAGE (1 to 5)					
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	TOTAL
Sales History (Quarterly and Annually) rate on total sales performance	4.0	3.7	3.8	4.0	4.2	3.9
In territory and out of territory contribution breakout	3.1	3.1	3.2	2.9	4.4	3.1
Major down accounts review, as well as major up accounts (are these trends expected to continue thru year-end?) significant loss discussion	3.8	4.3	3.7	4.0	4.0	3.9
Established analytic views (example- Power BI) always available and updating real-time	3.6	3.6	3.5	3.8	3.2	3.6
KPI dashboard	3.7	3.4	3.7	3.6	3.3	3.7
Gap "whitespace" analysis of top accounts where products are not used yet	3.4	3.6	3.3	3.6	3.2	3.5
Review lead pipeline	3.5	3.6	3.7	3.3	3.6	3.5
New Account development	3.8	3.7	3.9	3.7	4.2	3.8
NPI sales discussion	4.1	3.6	4.0	4.0	3.8	4.0
Out of territory tracking	2.7	2.9	2.9	2.6	3.6	2.8
Key Opportunities (Funnel Discussion) and when expected to close	3.8	3.9	3.8	3.8	4.2	3.8
Other - Please describe below	3.2	2.0	3.0	3.0	NA	3.0

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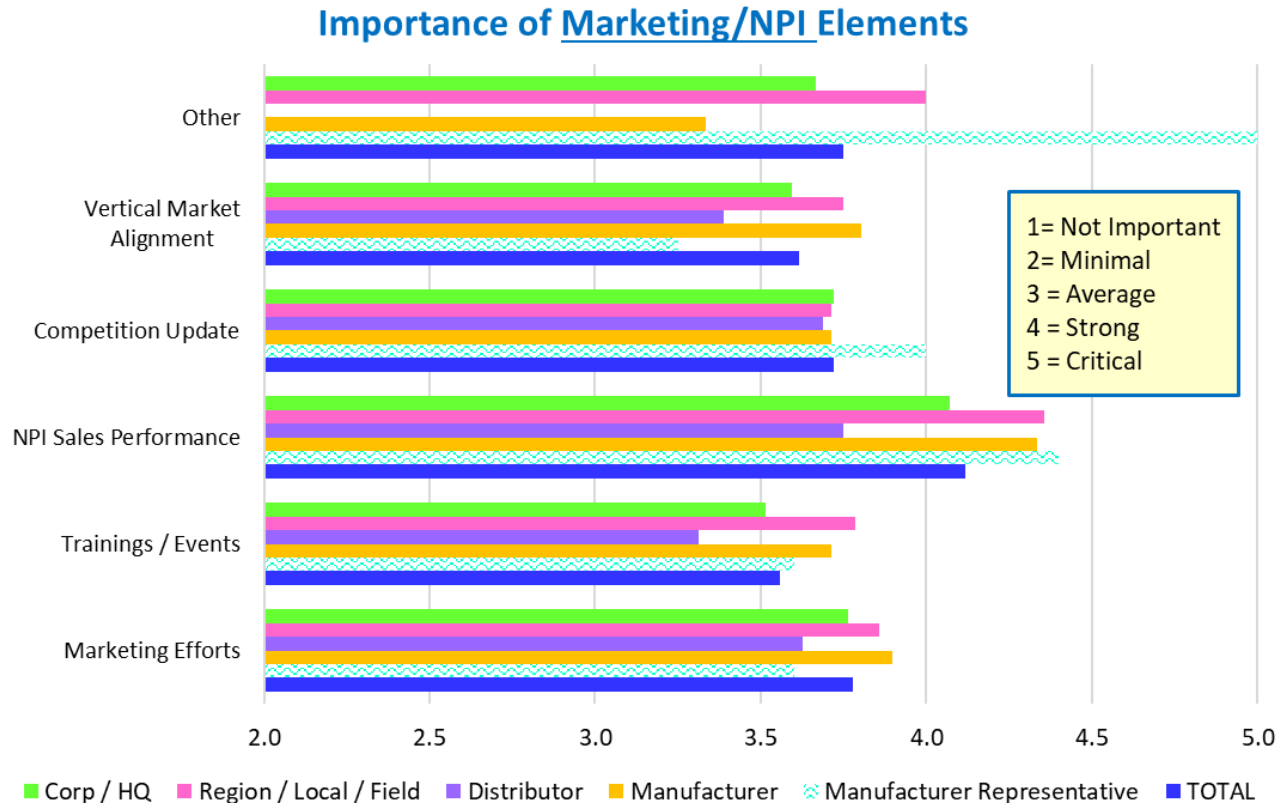


Distribution Item Importance



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Marketing/NPI Item Importance



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Distribution and Marketing/NPI Item Importance Tables

Important of these elements in the **Distribution** section?

ACTION	AVERAGE (1 to 5)					
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	TOTAL
Registrations - quantity, quality conversion revenue	3.6	3.9	3.5	3.8	3.8	3.7
Internal market share by major product line	3.7	3.8	3.5	3.9	3.8	3.7
Active promo summary (corporate and local)	3.5	3.5	3.4	3.6	3.4	3.5
Other - Please describe below	4.0	3.0	NA	3.5	5.0	3.8

Importance of these elements in the **Marketing / NPI** section?

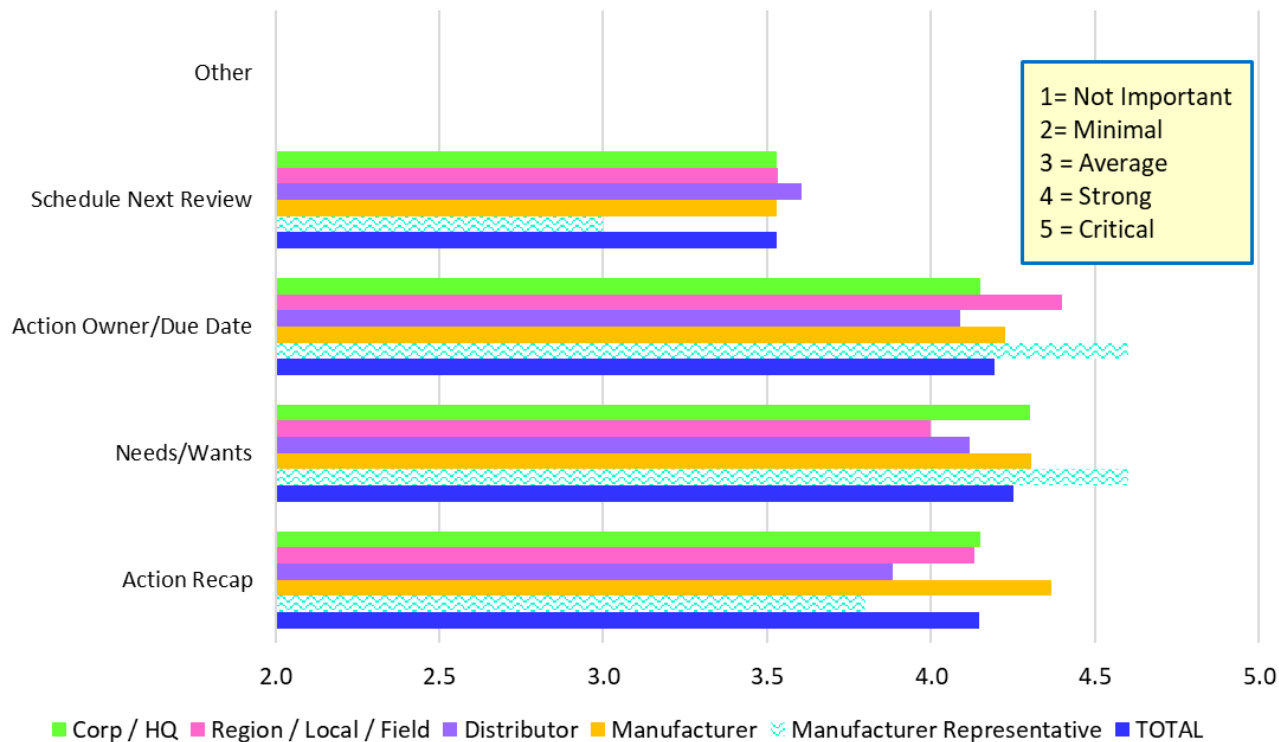
ACTION	AVERAGE (1 to 5)					
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	TOTAL
Marketing efforts - Social media, advertisements, etc.	3.8	3.9	3.6	3.9	3.6	3.8
Scheduled trainings, other events (trade shows, disty events)	3.5	3.8	3.3	3.7	3.6	3.6
NPI sales performance / Availability and support	4.1	4.4	3.8	4.3	4.4	4.1
Competition update	3.7	3.7	3.7	3.7	4.0	3.7
Vertical market alignment (if needed)	3.6	3.8	3.4	3.8	3.3	3.6
Other - Please describe below	3.7	4.0	NA	3.3	5.0	3.8

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Actions & Wrap-up Item Importance

Importance of Actions & Wrap-up Elements



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Actions & Wrap-up Items Importance Table

Importance of these elements in the **Actions & Wrap-up** section?

ACTION	AVERAGE (1 to 5)					TOTAL
	Corp / HQ	Region / Local / Field	Distributor	Manufacturer	Manufacturer Representative	
Recap of actions from current review	4.2	4.1	3.9	4.4	3.8	4.1
Needs/Wants from multiple parties - Roadblocks/issues, escalation needs	4.3	4.0	4.1	4.3	4.6	4.3
Owner Action Items and Completion Dates	4.2	4.4	4.1	4.2	4.6	4.2
Schedule for next review	3.5	3.5	3.6	3.5	3.0	3.5
Other - Please describe below	2.0	NA	NA	2.0	NA	2.0

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Advance Preparation Word Cloud



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Top Goals Word Cloud



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Discussion Elimination Word Cloud



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APPENDIX

