

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- extend or limit his sales boundaries for you.
- (2) Reviewing his product specialization and/or the industry he serves for compatability 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 pre-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 pre-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:

Important Points To Cover With A Prospective Agent

I. Agency Size

Remember that the largest agencies are not necessarily the best. If an agency has too large a staff or represents too many principals, the staff may be order-takers and not salespeople. Size is not as important as other factors. Often the smaller agency needs your business more than the larger agency. If they can do justice to your products do not eliminate them because of size.

- A. How many field-sales personnel does your agency have?
- B. Do you work with sub-agents?
- C. Is the owner actively involved as a salesperson?
- D. What is the number of office personnel?
- E. Describe any long-range expansion plans.
- F. Would you be willing to expand in order to accommodate a new account?
- G. If so, how would you go about it?
- H. Is the agency a corporation, partnership or sole proprietorship?
- I. How many offices do you have?
- J. Do you have any plans for opening new offices?

II. Growth Patterns

- A. How long has the agency been established?
- B. Describe your sales growth pattern during this time.
- C. What is your present sales volume?
- D. What is your sales volume per outside man?
- E. What are your sales objectives for next year?

III. Territory

- A. Describe the territory covered by your agency.
- B. Are you willing to expand the territory?
- C. If so, how would you go about such an expansion?

IV. Product Line

- A. How many lines do you represent?
- B. Are your present lines compatible with ours?
- C. Do you feel there would be any conflict or competition?
- D. Would you be willing to change from your present product market?
- E. If so, how would you handle the new product line?
- F. What do you consider the minimum sales you need to justify handling our line?

V. Facilities and Equipment

- A. Do you have warehouse facilities?
- B. If so, what size?
- C. What is your method of stock control?
- D. Do you have data processing equipment?
- E. If so, please describe.
- F. What type of communications facilities do you have (i.e., TWX, Telex, Wats, etc.).

VI. Company Policies

- A. Describe your agency's program for sales staff compensation, benefit programs and training.
- B. Do you have any special incentive or motivation programs?
- C. How do you monitor sales performance?
 1. Sales volume
 2. Effectiveness
 3. Morale
 4. Reputation
 5. Reports
- D. Would you and/or your sales staff attend factory seminars?
- E. If so, what expenses would you expect the manufacturer to pay?
- F. What is your policy regarding field visitation by factory personnel?

VII. Customers

- A. Describe the kinds of customers you currently are contacting.
- B. Are they compatible with our product line?
- C. Who are your key accounts?

VIII. Principals

- A. How many principals are you currently representing?
- B. Do you have a line card?
- C. Would you be willing to furnish us with a copy?