

IDA Dealer FIT 2012 - CONFIDENTIAL Questionnaire

**Remember that all information provided herein is subject to the signed Confidentiality Agreement
Answers DO NOT require the name of your firm, or its owner or its location**

YES, the length of the questionnaire reflects extensive questions that participants ask about operational details and how firms are managed. Estimate the requested numbers or percentages necessary to complete answers to the following questions. If you have actual data readily available, use it, but **your "best guess" is more useful than no answer at all.**

I: Classification Information

1. Place a check or an X in the box to the left of the description that best portrays your business

<input type="checkbox"/>	Primarily a full-service garage door dealer that may also sell non-door products or services
<input type="checkbox"/>	A retailer of building components & materials (including garage doors) offering or arranging for installation
<input type="checkbox"/>	Primarily a contract vendor/installer of selected products (including garage doors) for builders in multiple markets
<input type="checkbox"/>	Primarily a wholesale distributor of garage doors &/or building materials with occasional retail transactions
<input type="checkbox"/>	Primarily a garage door service specialist occasionally selling or installing doors
<input type="checkbox"/>	An industrial service business that includes garage door maintenance & repair

If none of the preceding descriptions satisfactorily portray your business, please write a simple description in the following space

<input type="checkbox"/>	
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2. How many separate locations does your firm operate? →

3. Indicate your firms' total **Annual Dollar Sales**
The number should indicate total revenue, not just that derived from garage doors, and should include all of the locations denoted in the previous question. →

Indicate the approximate % change (+or-) in annual volume from the previous year →

4. Approximately what **PERCENT of your business involves garage doors** (products or services) →

5. Does your firm **INSTALL GARAGE DOORS**? YES
 NO

6. If you marked YES to installation, please check the boxes to the left of the following statements that apply

- Installation employees are paid either **hourly or a salary** (some subcontract labor may also be used)
- Some Installation employees paid on a **piecework** basis (some subcontract labor may also be used)

7. What **PERCENT** of your installations are handled by subcontractors (NOT employees of your firm) →

If you use subcontractors, please check the boxes to the left of the following statements that apply

- Subcontractors used primarily for residential installations
- Subcontractors used primarily for commercial installations
- Subcontractors used primarily for residential service jobs
- Subcontractors used primarily for commercial service jobs

8. Is your firm **IDEA Accredited**? YES
 NO

Are any of your installers & technicians **IDEA Certified**? YES
 NO

IF yes, what % are certified?

9. **There are three parts to question 9. Each answer should reflect Annual Total Sales. Please supply data for all of part A and as much of parts B and C as you can provide.**

9A: Estimate the **composition of your firm's ANNUAL TOTAL SALES** (sum of all locations) by entering the PERCENTAGE of total revenue represented by each product category in the boxes below 9A:↓. For categories you do not sell, enter 0.

9B: Estimate the **number of door units** sold annually in each category (e.g., job with two 9x7 & one 16x7 would=3 units)

9C: Estimate the **number of operators** sold annually in conjunction with each category 9 C:↓

	9 A:↓	9 B:↓	9 C:↓	
Residential Garage Doors for New Construction	%			
Residential Garage Doors for Replacement & Remodeling	%			
Commercial Sectional Overhead-type Doors	%			
Commercial Rolling (coiling) Doors	%			
Sheet doors and related pre-fabricated storage facilities	%			
Fast Acting and Other Specialty Garage Doors	%			
Residential Service (including parts)	%			# Ops sold via service
Commercial Service (including parts)	%			# Ops sold via service
Installation of Doors Sold by Others (e.g., for "big-box" stores)	%			
Windows, Entry Doors, Hollow Metal Doors & similar products	%			
Dock Equipment including restraints, seals & bumpers	%			
Gates, Gate Operators & related products	%		# Gate Units	# Gate Operators
Wholesale Garage Doors to dealers and installers	%		# Door Units	wholesale Ops
Other Non- Door Products: - specify if possible:	%			

II: Management & Employee Information

10. **How many years** has your firm been owned by the same ownership ? →

Note: If the firm has been owned continuously by the same family, consider that as one owner even though management may have passed from generation to generation

11. Regarding **Management Practices**, please check the boxes to the left of the following statements that apply

<input type="checkbox"/>	Our firm has a designated or formal management team. If so how often does it meet?	
<input type="checkbox"/>	Our firm holds annual or semiannual business planning meetings	
<input type="checkbox"/>	Our firm establishes formal sales objectives for the firm by product classification	
<input type="checkbox"/>	Our firm establishes formal sales objectives for each person with sales responsibility	
<input type="checkbox"/>	Our firm furnishes monthly or regular sales results data to employees	
<input type="checkbox"/>	Our firm has a formal profit sharing program designed to stimulate a team atmosphere	
<input type="checkbox"/>	Management conducts a formal annual performance review for each employee (regardless of pay increase considerations)	
<input type="checkbox"/>	Our firm holds at least one employee appreciation event annually (e.g., holiday party, summer picnic, golf outing)	

12. **There are two parts to question 12.** First, indicate the **average number of full-time employees** your firm has in each category. Second, write "yes" or "no" to indicate whether **anyone** in that category has received a compensation increase within the last 12 months.

	Number of full-time employees ↓	"Yes" or "No" any wage or salary increases ↓
Owners / Managers - people responsible for direction & control		
Warehouse or Shop - people responsible for dispatching, loading, inventory		
Assembly & Delivery - usually limited to wholesaler-type intermediaries		
Office - includes but not limited to accounting, information processing, etc.		
Sales - people responsible for selling jobs (do not count mgt that also sell)		
Installation & Service - Field personnel who work at job sites (inc supervisors)		

13. Each of the following questions relate to the adequacy of your **computer system**. Check "yes", "no" for each .

Can you track a job through all costing, pricing & work order changes, and determine upon conclusion if the job made or lost money ?	→	<input type="checkbox"/>	YES
		<input type="checkbox"/>	NO
Can you collect the job data necessary to compare the relative productivity of installers and sales people ?	→	<input type="checkbox"/>	YES
		<input type="checkbox"/>	NO
Are sales categorized by customer or product to allow annual comparisons of the gross margin contributions of each ?	→	<input type="checkbox"/>	YES
		<input type="checkbox"/>	NO
Does management always receive reliable and accurate monthly income statements (also called P&L's) ?	→	<input type="checkbox"/>	YES
		<input type="checkbox"/>	NO
Are all trucks equipped with on-line computers to facilitate field billing, payment and reporting ?	→	<input type="checkbox"/>	YES
		<input type="checkbox"/>	NO
Are all management, operations and sales people linked by both computers & smart phones to facilitate decision making ?	→	<input type="checkbox"/>	YES
		<input type="checkbox"/>	NO

14. Regarding **Inventory Practices**, please check the boxes to the left of the following statements that apply

<input type="checkbox"/>	Our firm counts and values inventory at least annually
<input type="checkbox"/>	Our firm has a computerized perpetual inventory system (physical inventory may also be used to augment book data)
<input type="checkbox"/>	Our firm either ignores or only estimates inventory
<input type="checkbox"/>	Our firm's inventory counts & values big items but estimates small items, including items stored on trucks (e.g., fasteners)

15. Does the firm's ownership also own the building ? YES
 NO

III: Truck & Vehicle Information

16. All of the following questions relate to **Trucks**. Please supply data or check the boxes that apply.

How many working installation & service trucks does your firm operate ?	→	<input type="text"/>	Exclude trucks driven by owners, supervisors & sales people which are addressed in the next question
How many additional vehicles does your firm own, lease or support for management & staff ?	→	<input type="text"/>	
Denote the age of your working truck fleet: How many are less than 2 years old	→	<input type="text"/>	How many are 2 to 7 years old → <input type="text"/> over 7 years old → <input type="text"/>

Is your working truck fleet:

wholly owned
wholly leased
some owned & some leased

Is your working truck fleet **equipped with GPS** ?

YES
NO

If yes, is it used to determine truck location & job time ?

YES
NO

IV: Sales, Marketing & Advertising Information

17.

All of the following questions relate to **Advertising & Promotion Expenditures**. Please supply data or check the boxes that apply. Advertising includes the purchase of media, plus fees for writing, design & placement. Promotion includes the direct cost of signage, displays, company literature, participation in home shows and other events. Sales salaries, commissions, sales travel & entertainment SHOULD NOT be included in advertising and promotion.

What is your total annual expenditure for advertising (all types)?



This figure should be NET of any vendor rebates or coop funds

What is the approximate annual \$ amount of rebate or coop funds you receive from vendors



We have a company Website

If so, how often is the site updated or improved?

We direct searches for garage door information to our website by pop-up and pay per click or pay per view

We use "social media" (e.g., Twitter, Face Book, etc.) to energize customer contacts

At least one manufacturer provides a "find a dealer" type Internet link to our our firm

We have an "on-hold" telephone advertising message If so, how often is the message changed?

More than 50% of our advertising dollars are spent on yellow pages

We apply call-back stickers to all doors & operators installed or serviced

We participate in at least one local home show type event annually

We offer **extended product & installation warranties** as part of our marketing program

YES
NO

We offer **preventive commercial maintenance contacts** as part of our marketing program

YES
NO

18. All of the following questions relate to **Showrooms**. Please supply data or check the boxes that apply.

How many square feet are devoted to your product showroom? (enter "0" if you have no showroom) →

How many months has it been since the showroom was last updated? →

What is the approximate average number of customers (builders, architects, homeowners, etc.) that visit your showroom each week →

List any products OTHER THAN Garage Doors and Operators that you exhibit in your showroom →

V: Compensation & Benefits

Construction industry changes across the last six or seven years have necessitated downsizing and staff reductions and altered compensation arrangements. Many door dealers have requested guidance regarding both the form and amount of compensation, particularly for sales and field staff. For each of the four categories below, indicate typical salaries or hourly wages, and incentive rates, noting the basis for calculation (e.g., sales, units-per-day, etc.)

19.	Approximate Annual Salary	OR	Hourly Rate	+	Commission or Incentive Rate
Top or Lead Salesperson	\$ <input type="text"/>	OR	\$ <input type="text"/> calculation basis:	+	<input type="text"/> %
Average Salesperson	\$ <input type="text"/>	OR	\$ <input type="text"/> calculation basis:	+	<input type="text"/> %
Top or Lead Installer/Service Technician	\$ <input type="text"/>	OR	\$ <input type="text"/> calculation basis:	+	<input type="text"/> %
Average Installer/Service Technician	\$ <input type="text"/>	OR	\$ <input type="text"/> calculation basis:	+	<input type="text"/> %

Indicate the approximate annual \$ or % contribution employees make to their healthcare benefits coverage →

Owners &/or managers

\$ or %

Other employees

\$ or %