



For more information about ECIA Manufacturers' Rep Council Study:
<https://www.ecianow.org/business-reviews-best-practice>

Manufacturer with Manufacturer's Sales Representative

SEMI-ANNUAL PLANNING SESSIONS – 90 Minutes

ANNUAL PLANNING SESSIONS – 120 Minutes

Strategy for Review

- ☐ It should be about business strategy for accounts. Not for training, day to day tactical issues, or re-hashing old challenges.
- ☐ Distributor market-share should be compiled by Manufacturer prior to meeting.
- ☐ Most of the time should be focused on looking ahead and how to grow.
- ☐ Clear actions and person responsible should be listed.

Pre-Meeting Tasks

- ☐ The agenda and participants should be agreed upon in advance.
- ☐ Review previous meeting's Action Items and Current Status.
- ☐ Participants should agree to align on numbers (Sales, Registrations, etc.)
- ☐ List Top Opportunities and Funnel updates in advance of meeting with what is needed to close.
- ☐ Include Distributor Market share.
- ☐ Compile Product Roadmap and NPI recap.
- ☐ Identify challenges and areas of improvement.

Business Review Goals

- ☐ Develop clear direction and objectives, with what is required to achieve them.
- ☐ Develop an Action plan during Review.
- ☐ Mutually align on Goals.
- ☐ Review and advance the Action items developed previously.
- ☐ Discuss strategy for driving Customer Growth.
- ☐ Product Roadmap and NPI review – Drive Demand Creation.
- ☐ Review and discuss KPIs.
- ☐ Discuss the challenges, areas of improvement – Develop appropriate actions.



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Local Distributor Branch with Manufacturer's Sales Representative

QUARTERLY PLANNING SESSIONS - 90 Minutes

Strategy for Review

- ☐ It should be about business strategy for accounts. Not for training, day to day tactical issues, or re-hashing old challenges.
- ☐ Distributor market share should be developed by Manufacturer's Rep prior to meeting.
- ☐ Most of the time should be focused on looking ahead and how to grow.
- ☐ Discuss Target Accounts and plan to work together to visit / qualify.
- ☐ Tactical analysis and discussion on top Accounts and Top opportunities.
- ☐ Clear Actions should be listed and who has the responsibility and timing.

Pre-Meeting Tasks

- ☐ The agenda and participants should be agreed upon in advance.
- ☐ Review of previous meeting's Action Items and Current Status.
- ☐ Participants should agree to align on numbers (Sales, Registrations, etc.)
- ☐ List Top Opportunities and Funnel updates in advance of meeting with what is needed to close.
- ☐ Include Distributor Market share.
- ☐ Develop Target Accounts to discuss in planning session.
- ☐ Identify challenges and areas of Improvement.

Business Review Goals

- ☐ Develop an Action plan during Review.
- ☐ Assign accountability and timing to complete for each action.
- ☐ Discuss branch specific growth initiatives and what is needed from Rep.
- ☐ Mutually align on Goals / Collaboration.
- ☐ Discuss New Customers.
- ☐ Review and advance the Action items developed previously.
- ☐ Review Opportunity Funnel.
- ☐ Discuss NPI's and Target markets to promote.
- ☐ Discuss the challenges, areas of improvement.



Manufacturer with CORPORATE location Distributor

QUARTERLY PLANNING SESSIONS – 90 Minutes

SEMI-ANNUAL PLANNING SESSIONS – 120 Minutes

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Strategy for Review

- ☐ It should be about business strategy for accounts. Not for training, day to day tactical issues, or re-hashing old challenges.
- ☐ Distributor market share should be compiled by Manufacturer prior to meeting.
- ☐ Include NPI Review, inventory and turns update.
- ☐ Include top opportunities at a very high level.
- ☐ Include insight into challenges and areas needed for improvement.
- ☐ Mutually agree on what is needed to grow.

Pre-Meeting Tasks

- ☐ The agenda and participants should be agreed upon in advance.
- ☐ Review previous meeting's Action Items and Current Status.
- ☐ Participants should agree to align on numbers (Sales, Registrations, etc.)
- ☐ Prepare NPI Review.
- ☐ Include Inventory and Turns.
- ☐ Identify top opportunities and Actions to Close.
- ☐ Include Distributor Market share.
- ☐ Identify challenges and areas of Improvement.

Business Review Goals

- ☐ Review and advance the Action items developed previously.
- ☐ Mutually align on growth strategies.
- ☐ Express commitment on Sales Targets.
- ☐ Express Corporate Commitment.
- ☐ Review Opportunity Funnel at High level.
- ☐ Grow Market Share.
- ☐ Increase Joint activity.
- ☐ Discuss NPI's and Target markets to promote.
- ☐ Discuss the challenges, areas of improvement.

