



Distributor reporting template

When we started to work with a very large distributor for one of my clients, we have started to use a template to report to the management team of the distributor.

Down the track, I have used it on other occasions notably to share with distributor's management teams to inform them what we were doing with their sales team throughout the country.

You would be surprised, but it can be quite normal, sometimes the director of a business unit does not exactly know what is happening with the product in different regions. He or she is mainly focused on the high-revenue generating products. So you have to showcase to him all the good things that happen for your product. This is a marketing tool.

Use it as well to showcase to your board if you have one. You can showcase all the good things you are doing in a new export market. It is very powerful.

Update it on a quarterly or monthly basis.

[YOUR LOGO]		DASHBOARD 1er QUARTER 2015										[DISTRIBUTOR LOGO]	
SALES in EUR		3,250										at 03.04.2015	
REGION	YEAR	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
1	250		250										
2	2,500	500		2,000									
3	500		500										
4	0												
SALES REPRESENTATIVES QUESTIONS												JAN - MAR 2015	
REGION	WHO	WHEN	QUESTION									RESPONDED	
1	KARL	12/3/15	REQUEST FOR CATALOGUE AND TECHNICAL QUESTION ABOUT									Yes	
	CLARA	5/3/15	REQUEST FOR DISCOUNT FOR QUANTITY 500									Yes	
	SARA	6/3/15	QUESTION ABOUT MAINTENANCE									Yes	
	DIANE	4/3/15	QUESTION ABOUT CE MARKING OF THE PRODUCTS									Yes	
2	RALF	31/3/15	REQUEST FOR A CLIENT VISIT									Yes	
3	KARL L.	31/3/15	QUESTION ABOUT COMPETITIVE POSITIONING									Yes	
CONT.	CONT.	CONT.	CONT.										
MARKETING ACTION												JAN - DEC 2015	
REGION	Contact	WHEN	ACTION									WHO	
1	ANDREAS	8/5/15	CLIENTS VISITS AND SALES MEETING									[NAME]	
2	KARL	8/4/15	CLIENTS VISITS AND SALES MEETING									[NAME]	
3	MARTIN	15/5/15	TRAINING OF SALES TEAM									[NAME]	
4	THERESA	15/5/15	TRAINING OF SALES TEAM									[NAME]	
	ANDREAS	6/15	VIP EVENING WITH CLIENTS									[NAME] AND ANDREAS	
[CO.]	[NAME]	1/15	EXHIBITION OF NATIONAL TRADE SHOW									TEAM [CO. NAME]	
LEADS LIST												JAN - MAR 2015	
REGION	WHO	ENTERPRISE	APPLICATION	INDUSTRY	SOURCE	DATE	OUTCOME						
1	ANDREAS	MULTI-NATIONAL1	FIBREGLASS	AUTOMOTIVE	REGION1	8/4/15	NEXT MEETING						
2	KARL	MULTI-NATIONAL2	LAB	PHARMA	[YOUR CO.] WEBSITE	22/2/15	IN-PROGRESS						
3	KARL L.	LOCAL COMPANY1	MATERIAL	CONSTRUCTION	TRADE SHOW	15/01/15	NEXT MEETING 15/4/15						
[YOUR COMPANY] VISITS AND PLANNING OF SALES TRAININGS												JAN - DEC 2015	
WHEN	REGION VISIT					STATUS							
FEB	REGION 1 (30 pax)	REGION 2 (12 pax)	REGION 3 (8 pax)	REGION 4 (10 pax)		completed							
APR	REGION 4 (20 pax)	REGION 5 (40 pax)				confirmed							
MAY	REGION 1 (VIP night)					confirmed							
JUN													
AUG													
NOV	Trade Show					confirmed							