

AIM/R Annual Benchmarking Survey Worksheet

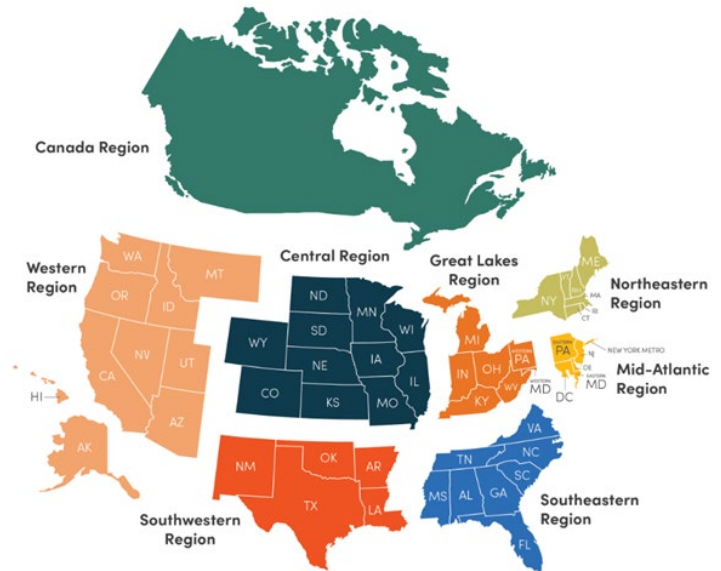
Use this worksheet to facilitate information collection for completing the CoMetrics web-based survey. This is **NOT** the actual survey, just a list of the questions you will be asked. This template is applicable to all years of the survey for which you may submit.

[Log in to complete the survey](#)

Background Info

Choose the region(s) of Operations:

- Western Region
- Central Region
- Southwestern Region
- Great Lakes Region
- Southeastern Region
- Northeastern Region
- Mid-Atlantic Region
- Canada Region



Number of FTEs	#
Exclude contract labor; only include W-2 employees. To report fractional FTEs, convert part-time employees to FTEs using 2,080 annual hours e.g., an employee working 20 hours per week all year = 0.5 FTEs	
Number of Warehouses	#
If none, enter zero	

Revenue and Cost

Buy-Sell	\$
Net of returns, discounts, and allowances	
Commissions	\$
Net of returns, discounts, and allowances	
Other Revenue	\$
Include income earned from consignment inventory (e.g., handling fees), service revenue, etc.	
Total Cost of Goods	\$
Include purchases, net of rebates and purchase discounts if applicable.	

Operating Expenses

Salaries - Wages Bonus Profit Sharing	\$
Include the total W-2 payroll for the year.	
Contract Labor	\$
Include 1099 labor. Exclude professional services (e.g., lawyer or accounting fees), which would be included as an Operating Expense under Administration.	
Commission Expense	\$
Include all commission expenses for the year.	
Benefits and Taxes	\$
Include all Benefits and Tax expenses for the year.	
Occupancy	\$
Include real estate rent, building repair and maintenance, telephone and network, utilities, and other occupancy expenses.	
Transportation	\$
Include operating vehicle and outbound freight expenses. Exclude non-operating vehicle expenses, such as sales vehicles.	
Other Operations	\$
Include equipment rental, equipment repair and maintenance, operating supplies, warranty expense, and other operations expenses.	
Sales and Marketing	\$
Include advertising and marketing, sales travel and entertainment, sales vehicle expense, and other sales and marketing expenses.	
Administration	\$
Include all other operating expenses (e.g., bank and credit card fees, bad debt, data processing and technology, business insurance, professional services, etc.)	
Depreciation and Amortization	\$
Include all depreciation and amortization expenses for the year.	

Other Income and Expense

Other Income	\$
Include all non-operating income (e.g., onetime subsidies, etc.)	
Interest Expense	\$
Include all interest expenses for the year.	
Income Tax	\$
Include all income taxes for the year.	
Other Non-Operating Expense	\$
Include all non-operating expenses for the year.	

Cash Flow

Average Owned Inventory	\$
Include all non-operating income (e.g., onetime subsidies, etc.)	
Average Consigned Inventory	\$
Sum of 12 month-end or average monthly balances divided by 12	
Average Accounts Receivable	\$
Sum of 12 month-end or average monthly balances divided by 12	
Average Accounts Payable	\$
Sum of 12 month-end or average monthly balances divided by 12	

Debt

Long Term Debt	\$
Year-end balance	
Average Balance Short Term Debt	\$
Sum of 12 month-end or average monthly balances divided by 12	

Company Investments (within the last year)

Facility Improvements	\$
Include warehouse and office investments. Exclude training facility investments.	
Fleet Improvements	\$
Include both distribution and sales / marketing vehicles. Exclude training vehicle investments.	
Training	\$
Include salary and benefits of training staff. Investments in training vehicles. Investments in training facility. Include certification expenses.	

Average Salaries

Average total cash compensation for the following roles	
Include bonuses, profit sharing, and commissions, <i>excluding</i> payroll taxes and benefits. Leave blank if the role does not exist in your organization.	
Principal	\$
Finance Lead	\$
Outside Sales Manager	\$
Inside Sales Manager	\$
Outside Sales Exclude owners of the business, executives, and sales managers.	\$
Customer Service and Inside Sales Include individuals that draft sales quotes.	\$
Warehouse Manager	\$
Warehouse Staff	\$
Specialist Such as builder, tool specialist, etc.	\$

Other

Percent of Remote Work	%
What portion of your office staff, excluding outside sales and warehouse staff, average at least one or more days per week working remotely?	
Number of Lines Comprising 80 Percent or More of Revenue	#
How many lines comprise 80% or more of your revenue?	
Artificial Intelligence	Y/N
Have you implemented any AI-based software to replace tasks previously performed by employees? For example, training content, marketing content, order entry, quoting, shipment tracking.	