

6 Partner Annual Review Points

Visiting your Partner at least once a year to review progress and discuss targets is critical. The more thought you both put into preparation for your meeting, the more productive it will be. A good idea is for each party to review the year from their own point of view, but using the same structure. Issues are more easily identified and difficult issues less likely to be brushed away. Review how well both parties' expectations have been met. What successes can be recognised? What has been learned? Has communication been effective? Use the Checklist below to structure your annual review.

The following modules offer a deeper insight into this topic:

Shared Commitment

Managing Partner Performance

You can find them either in the SavvyAcademy or in the 'Find and Manage Partners' area of 'Create Your Plan'.

Information you complete as part of the Module will be automatically entered into your Plan. The more modules you complete, the more your Plan will build.

Were sales targets met?

Think about...

Volume
Accounts
Margin
Other

Were expectations met for...

Sales visits
Direct mail/telesales/e-mail
Advertising
PR
Exhibitions
Trade Fairs
Other

Think about successes you can build on

What key lessons have been learned about the market-place?

Product trends
Promotional trends
General economic trends
Competitor developments (by competitor)

How effective was communication?

Reporting
Operational, general
Operational, speed of response
Cultural issues

Were expectations met?

Market knowledge
Sharing market information
Commitment to your company
Financial Strength
Storage facilities
Stock levels held
After-sales service
Repair facilities
Offering advice to customers
Technical support, spares etc.
Payment record
Other