Financial Management: Sales and Marketing

There is a fee associated with participation in APQC's Open Standards Research. If you have any questions about the fee, please contact the APQC helpdesk for more information.

This document should be used as a guide in the offline collection of data. APQC cannot accept submissions using this file. Please contact the APQC helpdesk on helpdesk@apqc.org for more information about offline submission.

OSBC DATABASE PRIVACY AND PROTECTION OF PERSONAL INFORMATION
Please refer to APQC's privacy statement for disclosures relating to the collection and use of your personal information.

Instructions

Research project structure
APQC OSBC research projects are designed to collect a wide variety of information about your entire organization, with a specific emphasis on the particular business entity for which the research is being collected.

Each survey is divided into a number of sections, separated by a block of introductory text. Each section of the research project presents questions about specific processes and activities in your business entity. Each of these process-specific sections corresponds to APQC's Process Classification Framework.

The last two sections contain questions about your organization as a whole and your particular business entity, respectively. Before each section containing process-specific questions, you are presented with a list of components of the PCF. This list identifies which components of the PCF are addressed by this particular section of the research project. The numbers in the list correspond to the PCF's unique numbering scheme. Questions within the section will address specific activities for the stated component of the PCF.

Navigation, Saving Results, and Submitting a Survey
The survey is presented in pages. Each page may have one to many questions on it. Each question on each page must be answered. Use the buttons at the bottom of each page to navigate throughout the survey. To avoid data loss, do not use the browser "back" and "forward" buttons to navigate through the survey. As you navigate through the survey using the "Previous" and "Next" buttons, your data are saved to APQC's secure servers.

The progress indicator at the bottom of each page displays a bar graph and a percentage which indicate your progress in navigating through the survey. The progress indicator does not account for completed questions, only for your relative position in the survey.

To exit the survey while you have not yet completed all questions, click the "Save" button at the bottom of the survey page, then close your browser. The system will present you a link to your particular instance of the survey. Use that link to return to the survey at any time.

Once you have completed the survey, click the "Submit" button on the last survey page. By submitting your survey results, you will notify APQC that your data are ready for validation. You will not be able to create, review, update or delete your answers after you have submitted the survey, so ensure that you have accurately documented your answers before you submit it.

Cookies, One Browser
The APQC OSBC survey tool uses a "cookie" to associate you to a particular survey instance. Your "cookie" is unique to the computer you used to start the survey, and is the only key that you have to access your data. Should you lose your "cookie", you will be unable to complete the survey and will need special assistance from APQC. Do not delete your APQC cookies until after you have submitted your survey data.

Because this "cookie" is unique to the computer you used to start the survey, other users will be unable to contribute results and data to the survey unless they have physical access to the browser which you used to start the survey.

Visit the Browser Setup page for more information about configuring your browser to use cookies.

JavaScript
The APQC survey application uses JavaScript for enhanced validation and usability features. In order to complete these surveys, you must use a browser that supports JavaScript, and you must have JavaScript enabled. Visit the Browser Setup page for more information.

Printing
To print a copy of the entire survey, you should use the "Preview" version of the survey. This view consolidates all of the questions associated with the particular survey onto a single printable browser page. No answers or personal data are contained on the "Preview" version of the survey.

As you navigate through the survey, you may print each page to record your answers. There is no facility to review all of your answers on one page.

Definitions
Each survey has a set of definitions associated with it that are unique to the process grouping covered by the survey. Throughout the survey, questions may have links to survey definitions.

Accurate results depend on a common understanding of the terminology used across survey respondents, so take special care to review the definitions in the glossary thoroughly. Common terms may be defined differently than you expect. When in doubt, contact APQC for guidance.

Reasonable Numbers
The survey asks for a number of detailed pieces of information. If you do not have the exact information that a question asks for, please provide a reasonable approximation. If you cannot provide a
reasonable approximation, please leave the answer blank. If you are not sure, contact APQC for guidance.

Reporting period
All questions in the survey, unless expressed otherwise, request data from the last complete fiscal year of your organization's or business entity's operations. Please be sure to provide the end-date of the fiscal year for which you are providing data. If you have any questions about the reporting period, please contact the OSBC help desk (contact information is provided below.)

Question numbers may skip
Occasional changes to the survey may result in the addition or removal of questions. Due to this activity, the question numbers in the survey may occasionally skip one or more numbers. Furthermore, some surveys will hide questions depending upon answers to previous questions. If you have any questions about the order of questions in the survey, please contact the OSBC help desk.

Contacting APQC with Questions
For any questions regarding the survey mechanics, the survey content, or general survey inquiries, please contact the OSBC helpdesk via telephone on +1.800.776.9676 (toll free, US only) or
+1.713.681.4020, or via email on osbc@apqc.org.

This survey covers the sales and marketing processes.

Please direct all survey related questions to the OSBC Helpdesk at (800) 776-9676 or Email the OSBC Helpdesk at OSBC Helpdesk.

General Background Questions
Regarding this entire data collection effort

Questions on this page deal with specific details about **this data collection effort**.

*197.0010 Please indicate the currency (e.g. U.S. Dollar, Euro, Japanese Yen, etc.) used for monetary responses in this survey. *This question must be answered in order to proceed to the next page.*

Currency

197.0020 Provide the end date of the twelve-month period for which your business entity will be providing data. *(All questions in the survey, unless expressed otherwise, request data from the last complete fiscal year of your organization's or business entity's operations. Pro-rata data are not acceptable, only actual data should be submitted. Please be sure to provide the end-date of the fiscal year for which you are providing data. If you have any questions about the reporting period, please contact the OSBC help desk on osbc@apqc.org.*

Period end date

Year	Month
*	*

— Page Break —

General Background Questions
Regarding your entire organization

The question on this page should be answered for the company's entire organization, including **all business entities** as well as the corporate headquarters.

Please provide your value responses with no currency marks, thousands separator, or other formatting. Also, a period should be used for a decimal mark, not a comma *(e.g. **1325.23**, not $1,325.23).*

197.0030 What is your entire organization's total annual revenue? (*Note that this question refers to the entire organization rather than the business entity defined for purposes of this survey effort. For example, the surveyed business entity could be a business unit of a publicly traded company, in which case this question should be answered as the corporate parent's total annual revenue.)*

Less than $100 million US Dollars

$100 million to $499 million US Dollars

$500 million to $999 million US Dollars

$1 billion to $5 billion US Dollars

$6 billion to $10 billion US Dollars

More than $10 billion US Dollars

The remainder of this survey will refer to the surveyed entity as the "business entity." You may be responding for a subset of the entire organization with which you are most familiar (such as a business unit or product line) rather than the entire organization. If so, please ensure that all data provided is consistent with this business entity definition; for example, if the business entity is a combination of business units within the organization, then all metrics, revenue, cost, and FTE figures provided should be an allocation from those business units rather than the entire organization.

General Background Questions
Regarding the specific business entity completing the survey

Questions in the remainder of this survey should be answered for the **business entity completing this survey**.

Please provide your value responses with no currency marks, thousands separator, or other formatting. Also, a period should be used for a decimal mark, not a comma *(e.g. 1325.23 not $1,325.23).*

197.0040 Considering the business entity that you are benchmarking, is it primarily consumer products?

Yes - we are primarily concerned with (e.g., manufacture or distribute) consumer products

No

197.0050 What is the total number of employees (temporary, part-time, and full-time) at your business entity?

Number of employees (headcount)

197.0060 What is the total number of FTEs at your business entity?

Number of FTEs

197.0070 What is your business entity's total annual revenue? If your business entity is a support unit such as a shared services center and therefore does not directly generate revenue, then provide the revenue amount for the units/business entities you support.

Total annual revenue

197.0080 What is your business entity's total annual cost of continuing operations? *(If your business entity is a support unit such as a shared services center, then include the costs for the units/business entities you support.)*

Total annual cost of continuing operations

197.0090 What is your assessment of your business entity's overall performance relative to industry peers? *(Select only one.)*

Top quartile

Middle half

Bottom quartile

197.0100 Which of the following best describes the customer strategy for your business entity? *(Select only one.)*

[Cost leadership](#)

[Product/service differentiation](#)

[Focus on the customer](#)

197.0110 Does your organization use an [enterprise resource planning (ERP) system](#) to coordinate key business information, resources, and activities across the value chain?

Yes

No

197.0120 Which of the following best describes your organization's maturity with regards to information availability and analysis capabilities? *(Options are listed in increasing order of maturity; select the option that best describes your organization's maturity.)*

We don't have regular access to data beyond basic transactions. Data is stored in spreadsheets or system extracts. Analysis is not performed on a regular basis and decisions are based on instinct or anecdote.

Data is in department or line-of-business silos. Insight generation is only performed on an ad hoc or periodic basis. Decisions may be supported by data, but are primarily based on past experience.

Structured operational data is available and may include some basic external data. Insights are generated at department or line-of-business level. Decision making is focused on analyzing past actions and consequences.

Traditional and unstructured data is integrated and available from enterprise sources as well as some external data. While data is available to many people based on their roles and needs, using it might require some technical assistance. Decision making involves historic analysis and predictive algorithms.

Real-time, internal and external data is readily accessible across the enterprise based on need. Information is shared extensively across the enterprise. The data is integrated real-time and users can access, manipulate and visualize data on demand. Data-driven decision making is part of the organization's culture.

This concludes the general background section

197.0130 Which of the following best describes how your organization analyzes the behaviors of its key customers? *(Options are listed in increasing order of maturity. Please select the highest level of maturity that your organization has achieved. Select only one.)*

Segmentation (when done) is against a single variable. Most behavior analysis is based on internal experience and knowledge of past patterns.

Business units develop segmentation models and simple patterns of behavior based on account history and demographics.

Enterprise segmentation models are based on multiple variables; some predictive modeling is used.

We have a holistic view of data with robust micro-segmentation and models to predict behavior patterns, which are shared across the enterprise.

We use advanced multidimensional segmentation to identify customer value (e.g. profitability), while real-time self-adjusting algorithms drive insights into response patterns.

197.0140 How are customer interactions tracked, monitored and measured? *(Options are listed in increasing order of maturity. Please select the highest level of maturity that your organization has achieved. Select only one.)*

Some efforts are made to track customer interactions and understand pain points. Customer activities are logged by channel.

Departments or business units are responsible for broad tracking and analysis of customer interactions.

We have an enterprise-wide program to track interactions and evaluate outcomes. We are able to understand all customer activities across channels in a single view.

Enterprise wide, we track customer interactions across channels, and we use this as an input to continuous improvement. Customer activities on one channel are visible to all channels in a timely manner.

All activity details and communications, including teaming with external partners, are available across and between all channels, such that we can seamlessly monitor customer interactions across our entire enterprise.

197.0150 What is your market share? *Compute as the percentage of total value (not volume) sold, that you are capturing (in the product/service categories being benchmarked). I.e., your annual sales revenue from a specific market, divided by the total sales revenue in that market for the same year.*

Market share

%

197.0160 What is the percentage of customers claiming to be satisfied in the most recent customer survey? *(Leave blank if you do not capture this data or if customer surveys are not used to determine satisfaction.)*

Percentage of customers

%

197.0170 What is the percentage of customers who say they would recommend your product or service to family and friends? *(Leave blank if you do not capture this data from customer surveys.)*

Percentage of customers

%

197.0180 What is your average customer wallet share? *(Compute as: for your current customers, the average percentage of their total spending (in the product/service categories being benchmarked) that you are capturing. This is based on surveys (sampling) of current customers.)*

Customer wallet share

%

197.0190 What is the percentage of customers who can name your brand in an unaided recall test (based on surveys/sampling of customers)? *(Leave blank if you do not capture this data.)*

Percentage of customers

%

197.0200 What is your percentage of revenue in the last year that is attributed to customers who made their first purchase of the brand in that year? *(Leave blank if you do not capture this data.)*

Percentage of revenue

%

197.0210 What is your business entity's customer retention rate for all customers over the last three years? *(The customer retention rate is defined as the number of customers who were active three years ago and are still active, divided by the number of customers who were active three years ago.)*

Customer retention rate

%

197.0220 What is your business entity's growth in revenues over the past year as a percentage, from the top twenty percent of your customers? *(Leave blank if you do not know.)*

Growth in revenue

%

197.0230 What percentage of your active customers are profitable? *(Leave blank if you do not know.)*

Percentage of active customers

%

Channel Distribution

197.0240 What percentage of your total annual sales orders are received through each of the following channels? *(Use a zero if a channel is not used. Please allocate to 100%.)*

Channel	Percentage of sales orders received
a. Traditional channels (such as face-to-face, phone calls, fax, post)	%
b. "New" channels (digital/electronic channels)	%
c. Total (*Must equal 100%*)	%

197.0250 What percentage of your sales force works in each of the following sales methods? *(Please allocate to 100%.)*

Sales Method	Percentage of Sales Force
a. Internal including contact centers (not face to face or channel sales)	
b. Face to face with customers	
c. Channel sales	
d. Total (*Must equal 100%*)	

Cost and FTEs

197.0260 What are your total annual budget and FTEs for marketing and sales? *(If you are benchmarking a subset of your total organization's offerings, then include only the budget and FTEs for that subset.)*

	Budget	**FTEs**
Marketing (including trade spending if applicable)		
Sales		

197.0270 What is your average cost per sales order for each of the following channels of order receipt?
Leave blank if you do not offer the channel.

Channel	**Average cost per sales order**
a. Traditional channels (such as face-to-face, phone calls, fax, post)	
b. "New" channels (digital/electronic channels)	

Sales Process

197.0280 Does your sales force know which customers are most profitable?

No

Yes

Don't know

197.0290 Which of the following best describes the availability to your sales force of customer and product information during the sales cycle?

All required information immediately available

Some but not all information is available as needed

In general, the required information is not immediately available as needed, and/or is not in a usable format

197.0300 What is your business entity's total annual sales force turnover (percentage of total sales employees who left during the past year, whether voluntary or involuntary)

Total annuals sales force turnover

%

197.0310 What percentage of your sellers made their quotas/targets last year? *(Leave blank if not applicable.)*

Percentage of sales force

%

197.0320 What is the percentage of qualified leads where the sale is closed? *(Leave blank if this does not apply.)*

Percentage of qualified leads

%

197.0330 What is your average sales cycle in calendar days, from when a lead/opportunity is identified until the sales is closed?

Days

197.0340 Does your business entity measure, track, and reward first-time data accuracy for quotes and order management? *(Select only one.)*

No
Yes

197.0350 What is your average monthly sales forecast error within a product family?

Monthly sales forecast error

%

197.0360 Of the total annual number of inbound contacts, for what percentage was an additional cross-sell or up-sell sale completed?

Percentage of inbound contacts

%

197.0370 For inquiries on existing orders and service-after-sales requests, what is your first contact resolution rate?

Percentage of inquiries

%

Direct Marketing Campaigns

197.0380 What is the total annual number of direct marketing campaigns executed?

Number of direct marketing campaigns

197.0390 What is the average cycle time in calendar days to develop a direct marketing campaign, starting with the development of campaign goals and identification of target audience until the campaign is launched through media channels?

Average cycle time in calendar days

197.0400 What is the total annual revenue generated by direct marketing campaigns?

Total annual revenue

197.0410 What is the total annual cost incurred for direct marketing campaigns?

Total annual cost

You have reached the end of the survey. You can use the **previous** button to review your answers for accuracy and reasonableness. After pressing the **submit** button, you will no longer be able to directly edit your data in this survey form.

The next step will be review and validation of your responses. APQC will contact you to conduct a final review of your responses and verify that your responses were as you intended.

Please click the **Submit** button to complete the survey and transmit your data.

In order to obtain a printed version of your completed survey, you will need to print each page **before** submitting your responses. After you select "submit," you will be unable to print your completed survey.

Please direct all survey related questions to the OSBC Helpdesk at (800) 776-9676 or Email the OSBC Helpdesk at OSBC Helpdesk.