



# Restricted Round Tables

‘Sharing Best Practices’

October 22<sup>nd</sup>, 2015



**Introduction:** *The information you are about to provide is **confidential**. Neither your company’s name nor location will be printed. You will be assigned to a SEALS Team and a code (like a Swiss bank account) which only you will know. Company data comparisons will appear on a spread-sheet so that you can compare your company’s performance to others participating in the survey. Only Jeff Klein will compile the data and no-one else will have access to it. He is sworn to secrecy. By providing this information, you agree to have your information included without you being identified.*

*When you participate in this survey, you will gain valuable information to help you increase efficiency, productivity and make your business more profitable. We will compile ratios that will show you how you compare your business to other closet companies of similar size, sales, & capabilities. This type of survey was first used by National Closet Group in 2005 and resulted in substantial growth for the individual companies participating when they were able to gauge their performance with others in the industry. Right now, you probably have no idea how you compare.*

*If you are not sure about certain percentages or dollar amounts, take an educated guess. If you want to grow your company, you really need to know this stuff. This will be a lot of work for some of you. It will take some time to compile the answers. However, it will be the most valuable information you will take home with you at the end of the Summit. You will know exactly how you compare to your peers.*

# Worksheet

Print these sheets and use them to prepare for the Survey Monkey being sent to you shortly. You will be issued your code at that time. Do not attempt to fill out the Survey Monkey without filling in this worksheet. If you have any questions, call Jeff at 912-313-9943.

**Company Name:** \_\_\_\_\_

**Company History:**

Year established: \_\_\_\_\_  
Are you the original owner? Y/N  
If no, what year did you purchase the business? \_\_\_\_\_

**Employees:** If employee has dual roles like production & install, divide in half for each category. Full time =1, part time=1/2:

Number of designers, sales, engineers: \_\_\_\_\_  
Number of fabricators, shop helpers, warehouse: \_\_\_\_\_  
Number of installers, helpers: \_\_\_\_\_  
Number of owners, office staff, administrators, book-keepers, receptionists: \_\_\_\_\_  
Total employees (must be sum of the above): \_\_\_\_\_

**Product Colors:**

% of jobs white, antique white, almond, solid colors laminate: \_\_\_\_\_%  
% of jobs non-white laminate: wood grain \_\_\_\_\_%  
% of jobs real wood: \_\_\_\_\_%

**Installation Type:**

% of jobs floor mounted: \_\_\_\_\_%  
% of jobs wall mounted: \_\_\_\_\_%

**Percentage of annual sales:**

% sales from closets, pantries, garages, home offices, all residential storage: \_\_\_\_\_%  
% sales from wall beds: \_\_\_\_\_%  
% sales from kitchen and bath \_\_\_\_\_%  
% sales from commercial casework: \_\_\_\_\_%  
% sales from other: \_\_\_\_\_%

**Total number of jobs sold per year:** \_\_\_\_\_ #

% sales from new construction: \_\_\_\_\_%  
% of sales from repeats/referrals: \_\_\_\_\_%  
Company-wide sales closing ratio: \_\_\_\_\_%

**Closet & Storage sales:**

Annual sales 2013: \$ \_\_\_\_\_  
Annual sales 2014: \$ \_\_\_\_\_  
Projected annual sales 2015: \$ \_\_\_\_\_  
Best sales year ever: \$ \_\_\_\_\_  
Revenue per employee (total sales divided by total employees) \$ \_\_\_\_\_

**Compensation for employees:** Circle which apply

Pay installers: % of job, salary, hourly, combination  
Pay designers: % of job, salary, hourly, combination

**General:**

Number of showroom(s): \_\_\_\_\_  
Numbers of installation vehicles: \_\_\_\_\_

Name of Design software used: \_\_\_\_\_

Name of CRM or Customer Data Base used: \_\_\_\_\_

Service range (miles): \_\_\_\_\_ miles radius

Territory Size/service range population. Circle one:

- Under 250,000
- 250,000-500,000
- 500,000- 1 million
- 1 million- 3 million
- Over 3 million

Do you manufacture a majority of your own product?: Y/N or \_\_\_\_\_%

Do you outsource a majority of your product?: Y/N or \_\_\_\_\_%

***Provide type of equipment used.***

Type of saw: beam saw, table saw, point to point, other \_\_\_\_\_

Type of boring: line borer, CNC, other \_\_\_\_\_

Type of edge-bander: hot air, glue pot. Other \_\_\_\_\_

Other large equipment: \_\_\_\_\_

**Major direct competitors:**

Independents/Dealerships ~ no names \_\_\_\_\_ # only

Franchises (circle)~ CalClosets, Closet Factory, Closets by Design, Closet & Storage Concepts/More Space Place, Classy Closets, other \_\_\_\_\_

Cabinet Shops/kitchen & bath ~ \_\_\_\_\_ # only

**See the attached closet designs and specifications.**

If you sell these systems, what would you charge:

Design #1: \$ \_\_\_\_\_  
Design #2: \$ \_\_\_\_\_  
Design #3: \$ \_\_\_\_\_  
Design #4: \$ \_\_\_\_\_