

## 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.

### More On This Topic

The following module offers a deeper insight into this topic:  
**Agreeing And Reviewing Targets**

You can find this module at  
<https://exportsavvy20.com/doing-business-with-agents-and-distributors/agreeing-and-reviewing-targets/>

### Were sales targets met?

*Think about...*

Volume  
Accounts  
Margin  
Other

### Were activity 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 marketplace?

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

**Remember – If you can't measure it - it is difficult to manage it**

## **Who sets the targets? – find out here**

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