

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



How many warehouses do you operate? (enter 0 if none)	#
How many total square feet of warehouse space? (enter 0 if none)	#
How many Full-Time-Equivalent (FTEs) employees work at your company? 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).	#

Revenue Sources

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.	\$

Cost of Goods

Total Cost of Goods (on Buy-Sell revenue) Include only the cost of goods related to your Buy/Sell revenue. Do not include costs associated with commission-based sales. Net of rebates and purchase discounts. If you do not have Buy/Sell revenue, enter zero.	\$
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Operating Expenses

Salaries - Wages Bonus Profit Sharing Include all W-2 payroll for the year.	\$
Contract Labor Include 1099 labor related to sales activity. Exclude contracted professional services (e.g. lawyer or accounting fees). Include commissions paid to outside sales agents or sub-reps. Do not include commissions already reported in Salaries/Wages/Bonuses/Profit Sharing. If commissions are part of your W-2 payroll, report them in Salaries above, not here. If none or unsure, enter zero.	\$
Employer Paid Benefits and Taxes	\$
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 (report sales vehicle costs under Sales and Marketing).	\$
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, contracted professional services - such as lawyer and accounting, etc).	\$
Depreciation and Amortization	\$

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

<p>The three questions in this section all ask for an average monthly balance. There are two generally accepted ways to calculate an average monthly balance:</p> <ol style="list-style-type: none"> 1. Take the Sum of 12 month-end balances and divide by 12 2. If 12 monthly balances are unavailable, use: (beginning of year \$ value + end of year \$ value) / 2 	
Average Owned Inventory (exclude consigned inventory) Include all inventory received into a warehouse and related to buy/sell activity	\$
Average Accounts Receivable	\$
Average Accounts Payable	\$

Debt

How much long-term debt does your company owe? Year-end balance. If none or unsure, enter zero.	\$
What was the average balance of short-term debt (e.g. line of credit)? There are two generally accepted ways to calculate an average monthly balance: <ol style="list-style-type: none"> 1. Take the Sum of 12 month-end balances and divide by 12 2. If 12 monthly balances are unavailable, use: (beginning of year \$ value + end of year \$ value) / 2 	\$

Company Investments (within the last year)

How much did you invest in the following areas last year (include both operating expense and capital expense):	
Facility Improvements Include warehouse and office investments. Exclude training facility investments. If none or unsure, enter zero.	\$
Fleet Improvements Include warehouse and office investments. Exclude training facility investments. If none or unsure, enter zero.	\$
Customer Training (not internal staff training) Include all training-related spending: certification and course fees, training staff compensation, and any investments in training-dedicated facilities or vehicles. Do not include general employee compensation or facilities already reported elsewhere. If none, enter zero. Leave blank only if unsure.	\$

Average Salaries

Average total cash compensation PER EMPLOYEE for the following roles Include bonuses, profit sharing, and commissions, <i>excluding</i> payroll taxes and benefits. Do not report the total for all employees in the role — report the average for one person. Leave blank if the role does not exist.	
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 (trainer, outside 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? Enter as a percentage (e.g., enter 25 for 25%).	%
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Line Concentration What percentage of your revenue is comprised of your top three lines?	%
Number of Lines Comprising 80 Percent or More of Revenue How many lines comprise 80% or more of your revenue?	#

Artificial Intelligence

Have you implemented AI-based solutions in any of the following areas?	
Marketing content creation and/or delivery	Y/N
Training content creation and/or delivery	Y/N
Finance tasks	Y/N
Administrative Tasks	Y/N
Project tasks such as bidding work or scheduling	Y/N
Shipment tracking	Y/N