

special individual or department of your organization? (Such as Sales Engineering Dept.; Merchandising Dept.; Merchandise Manager; Sales Research Dept.; Promotion Dept.; etc.)

Six replies state that such plans come from special departments (Sales Engineering, Sales and Planning, Merchandise Council, Sales Statistics); three that such plans come from various sources; one from a committee concerned principally with the financial budget; one as a consensus of opinion of department heads; three from the Sales Manager; one each from Merchandise Manager and Asst. Sales Manager; three state that there is no organized information sent to authority determining sales plans.

3. Do these plans come to the determining authority for its consideration and approval in the nature of definite schedules: (a) which outline a sales plan or campaign only; (b) which outline a coordination of sales, production (or purchasing) and financial actions involved?

Eight replies state that plans aim at complete coordination of sales, production and finances; one that such coordination is limited; one that such coordination is chiefly financial; three that a sales plan only is attempted; three that sales plans are made, with such a rough checking against factory capacity as the General Manager or Sales Manager can make without special detail information; two that there are no definite sales plans.

II. SALES ENGINEERING

Also called Sales Planning, Merchandising; Merchandise Control; Sales Research; Sales Promotion; Sales Development; etc. The function of devising sales plans for consideration of the ultimate sales-policy-determining authority, involving the study of markets, old products, new products, competition, production capacity, etc.; involving also possibly the preparation of master schedules embodying the sales plan.

1. Do you recognize the devising of sales plans as a function distinct from actual selling?

Interpreting this to mean general plans and master schedules, seventeen replies state that this is a distinct function; three that it is not.

2. Does your organization provide for a department or staff which is responsible for the function of devising sales plans? What is the name given by you to the department?

Nine firms state that they have no such separate department or staff; one that such a staff is being organized; ten that the function is recognized and provided for by special departments such as Sales Engineering, Sales Statistics, Sales

Promotion, Sales Planning departments; one by a committee of the Directors consisting of department heads; three by special executives; one by outside experts.

3. Does the sales engineering or planning department, in its research, study: (a) Markets; (b) old products; (c) new products; (d) competition; (e) plant capacity?

Of those firms which make special provision for sales planning, eight consider all of these phases of the problem; four additional consider all except plant capacity; five firms report that these matters are taken into consideration by the General Manager and department heads; five state specifically that no special study is made of them.

4. Does the sales planning department limit its activities to research and reports; or does it work out specific written plans in the nature of master schedules which provide for coordination of sales, production and finance?

Five firms reply that in addition to research, master plans and schedules are prepared which coordinate sales, production and finance; one that such work is just beginning; one that master schedules are prepared without much research; one that the scheduling is limited principally to finances; three that the Sales Manager or his associates prepare rough schedules; seven that they can claim neither research nor the preparation of master plans and schedules.

5. If you have not a functionalized sales engineering or planning department or staff, state how you provide for the performance of this function.

Of those firms which do not provide for sales engineering or planning by special departments or staffs, four state that sales planning is a responsibility of the Sales Manager, either alone or in consultation with salesmen; one, of an executive committee which has additional duties; one, of a Vice-President in charge of sales; one, of the President's office; one, of the Superintendent of the Factory who watches shipments, orders and production.

III. SALES OPERATING

The functions of carrying out sales plans, involving the selection, training and direction of salesmen; the working out of detail plans to give effect to master sales plans; the securing and preparation of sales materials; records of sales performance and cost; contacts with customers; etc.

1. Do you recognize this as a function distinct from sales engineering or planning?

Sixteen of the firms replying state that sales operating is recognized as a distinct function; one that it is coming to be so recognized by them; two that it is not so recognized.

2. Is this function performed by a department or unit distinct from that which performs the function of sales engineering or planning?

Thirteen replies state that sales operating is not performed by a separate department; four state that it is performed by a separate department; three that the separation of sales engineering and operating is only partial.

3. Does your sales operating department have charge of the following functions (if not, state what department has charge of each): (a) selection of salesmen; (b) training of salesmen; (c) direction of salesmen; (d) "educating" of customers; (e) advertising; (f) warehousing; (g) shipping; (h) traffic?

The replies to this question are most interesting. Nineteen state that the selection of salesmen, the training of salesmen, the direction of salesmen and the "educating" of dealers are in charge of the Sales Operating Department, with the exception that one places the training under the Sales Engineering Department and another states that they have practically no training of salesmen and "education" of dealers. Eleven place advertising under Sales Operating; one under a Merchandise Department; one under Sales Engineering; two in a distinct Advertising Department. With respect to warehousing, four place it under Sales Operating; one under Sales Engineering; one under the Treasurer; and four under the factory management. Shipping is placed by only two under Sales Operating; by two under the Treasurer; and by seven under the factory management. Traffic is placed by three under Sales Operating; by two under the Treasurer; by one under the Accounting Department; and by five under the factory management. One reply states that all of these duties are under the General Manager.

4. Does your organization provide for a unit in the sales operating department which takes the master sales plans and schedules and works out detail plans or schedules for carrying out the master plans; i. e., a planning of the actual work of performance?

Ten firms state that they have no such unit in the Sales Department for detail planning. Two state that they have such unit; two state that they have such unit in embryo; one that it is in contemplation. Four state that the Sales Manager makes detail plans for his department.

5. Does this planning of actual performance involve: (a) analysis of master plans as first step in making detail working plans; (b) laying out of detail working plans in the form of written schedules; (c) checking of reports of performance against written detail working plans?

Six firms state that all the phases of planning above indicated are carried out in the Sales Department; one that all three are in contemplation; one that (a) and (b) but not (c) are carried out; and one that (c) but not (a) and (b) is carried out.

6. Does your sales operating department provide for the study of the art of personal selling for the purpose of improving the salesmen's methods?

Twelve firms state that study is made of the art of personal salesmanship; four that it is not; two that it is done superficially; one that it is a responsibility of the Sales Manager.

7. Have you ever made a time-study of a salesman's work, or any kind of job analysis of his work?

Eleven firms reply that no job analysis of the salesman's job is made; five that there is such analysis without time study; three that there is such analysis including time study.

IV. GENERAL

1. What are the functions of your sales manager; does he have supervision of sales engineering or planning, as well as of the selection and direction of salesmen?

Thirteen replies state that the Sales Manager supervises both sales planning and sales execution, even when the routine of planning is performed by a distinct unit. Three state that he is responsible for execution only. One states that he is primarily responsible for execution, but participates in planning by his presence on a planning committee. One states that a Distribution Manager is responsible for both planning and execution and that under him are sales managers who are responsible for execution only.

2. Do you believe the function of sales engineering or planning requires a type of personnel different from that required by the function of actual selling? If so, what are the differences?

Eighteen replies express the opinion that sales engineering or planning requires a personnel different in temperament from that required in sales operating; one that the difference is not great; one that "it does not in our business but probably does in most." There seems to be general agreement that actual sales operations require the vigorous, motor type of man and sales engineering or planning the engineering, studious, analytic type, and that the latter must also possess imagination.

3. Do you make provision for effective close cooperation between the sales department and the production department in order to keep the output of both departments in balanced relation?

Sixteen firms make serious effort to coordinate selling and production; one is just beginning to attempt coordination; one states that the production manager does the coordinating; one that production and sales seem "practically unrelated."