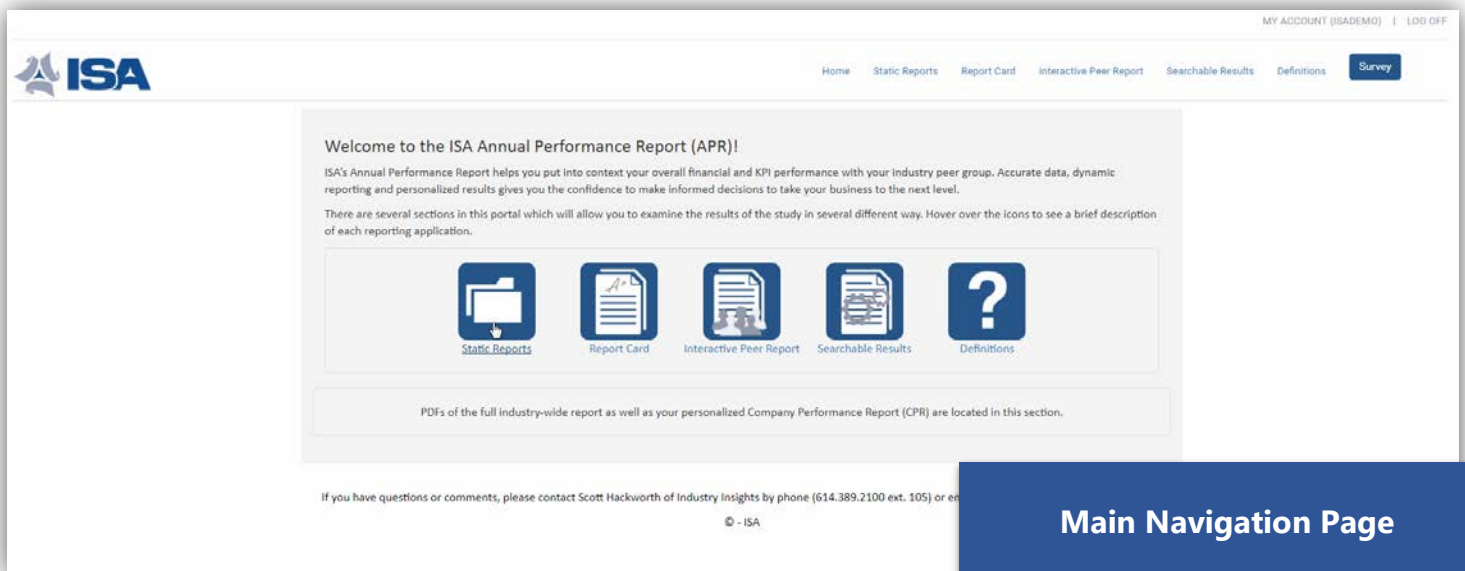
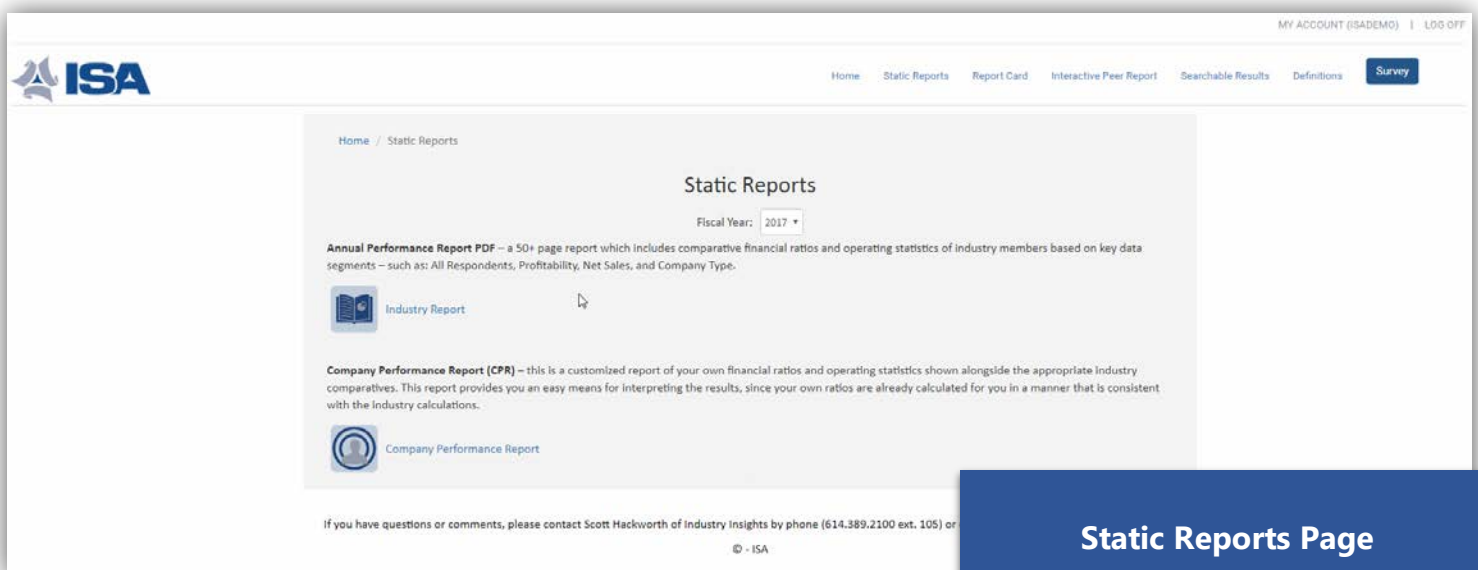


ISA Annual Performance Report Reporting Tools



Main Navigation Page

Provides an overview of the various reporting tools and brief descriptions of each applications. This page is designed to allow users to quickly and effectively access each report.



Static Reports Page

This section of the site will house both the downloadable individualized Company Performance Report (CPR) as well as the ISA Annual Performance Report.

Interactive Peer Report

Results Fiscal Year: 2017 •

You can compare your own data versus five peer groups of your choosing. Simply select the peer group you wish to compare yourself against from the dropdown menus and then click "Build Report". Created reports can be exported to Excel once they have been built.

Select Up To Five Peer Groups	
Peer Group 1	Profitability: High Profit Firms None Selected
Peer Group 2	Organization Type: General Line Firm Organization Type: Specialty Firm
Peer Group 3	Profitability: High Profit Firms Net Sales: Less Than \$20 Million
Peer Group 4	Net Sales: \$20-\$40 Million Net Sales: Over \$40 Million
Peer Group 5	Sales By Sales Channel: Over 80% Warehouse Sales Sales By Sales Channel: 70%-80% Warehouse Sales Sales By Sales Channel: Under 70% Warehouse Sales Number of Locations: 1 Number of Locations: 2 to 5 Number of Locations: 6 to 10 Number of Locations: More Than 10

If you have questions or comments, please contact Scott Hackworth of Industry Insights by phone (614.389.2100 ext. 105) or email (shackworth@industryinsights.net).

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Interactive Peer Report

This tool allows users to create customized Company Performance Reports on demand. Users may select up to 5 data cuts to compare their figures against.

☒ Show My Data

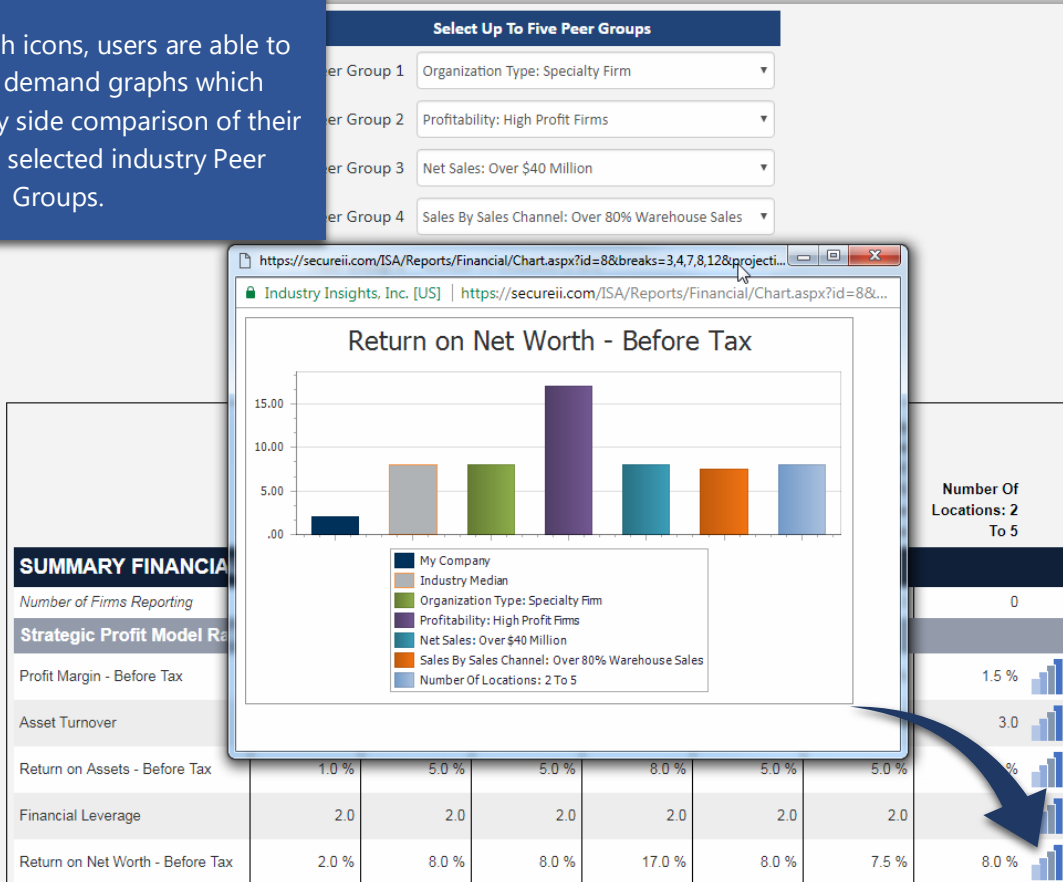
Build Report

[Export to Excel](#)

	Your Data	All Companies	Profitability: High Profit Firms	Net Sales: \$20-\$40 Million	Organization Type: General Line Firm	Sales By Sales Channel: Over 80% Warehouse Sales	Number Of Locations: 2 To 5
SUMMARY FINANCIAL RESULTS (FIFO BASIS)							
Number of Firms Reporting	0	0	0	0	0	0	0
Strategic Profit Model Ratios							
Profit Margin - Before Tax	0.0 %	1.3 %	1.8 %	*	1.4 %	1.1 %	1.5 %
Asset Turnover	4.0	4.0	5.0	*	5.0	4.0	3.0
Return on Assets - Before Tax	1.0 %	5.0 %	8.0 %	*	5.0 %	5.0 %	5.0 %
Financial Leverage	2.0	2.0	2.0	*	2.0	2.0	2.0
Return on Net Worth - Before Tax	2.0 %	8.0 %	17.0 %	*	9.0 %	7.5 %	8.0 %
Sales Performance							
Typical Sales Volume (000s)	\$ 7,527,312	\$ 6,956,504	\$ 6,260,429	*	\$ 6,406,205	\$ 8,870,371	\$ 7,042,611
Sales Change (2017 To 2018)	7.0 %	31.0 %	28.0 %	*	31.0 %	31.5 %	30.0 %
Income Statement (% of Revenue)							
Net Sales	100.0 %	100.0 %	100.0 %	*	100.0 %	100.0 %	100.0 %
Cost of Goods Sold	83.0 %	83.3 %	68.6 %	*	74.1 %	98.6 %	94.0 %
Gross Margin	29.0 %	29.0 %	25.7 %	*	30.1 %	27.0 %	30.5 %
Operating Expenses:							
Sales and Marketing Expenses	11.0 %	11.0 %	9.6 %	*	11.2 %	10.9 %	11.9 %
Delivery Expenses	2.0 %	2.4 %	2.3 %	*	2.3 %	2.6 %	2.9 %

Downloadable Graphs (Peer Report)

Using the graph icons, users are able to generate on demand graphs which display a side by side comparison of their data and the selected industry Peer Groups.



[Home](#) / [Report Card](#)

Report Card

Fiscal Year: 2017

The report card provides an objective, qualitative evaluation of your business' performance versus similar reporting companies in the industry on the basis of various key performance measures. In particular, your company is compared to other reporting companies to determine whether you performed: Strong, Good, Fair or Weak. These four performance categories relate to the four possible quartile ranges which a reporting company may fall in for any given measure. While this evaluation does not consider any "special circumstances" that may exist for your company which result in the appearance of strong or weak performance, it is designed to direct your attention to potential improvement opportunities.

You may select which data grouping you would like to be "graded" against by selecting from the dropdown below. A "*" indicates that data was not provided for that metric.

All Responses

Export to Excel

STRATEGIC PROFIT MODEL RATIOS	Your Data	Industry Median	Status
PROFIT MARGIN	0.0 %	1.0 %	Weak
ASSET TURNOVER	4.0	4.0	Good
RETURN ON ASSETS (PRE-TAX)	1.0 %	5.0 %	Weak
FINANCIAL LEVERAGE	2.0	2.0	Good
	2.0 %	8.0 %	Weak
PERCENT	Your Data	Industry Median	Status
	7.0 %	31.0 %	Weak
	\$ 7,527,312	\$ 6,956,504	Good
	29.0 %	24.0 %	Good
INSES	27.0 %	24.0 %	Fair
	1.0 %	1.0 %	Strong
	0.0 %	1.0 %	Weak

Report Card

The report card is designed to provide users with the ability to "grade" their key performance measures against similar companies in order to identify potential improvement opportunities.

[Home](#)
[Static Reports](#)
[Report Card](#)
[Interactive Peer Report](#)
[Searchable Results](#)
[Definitions](#)
[Survey](#)

[Home](#) / [Searchable Results](#)

Searchable Results

Fiscal Year: 2017

The purpose of the tool is to allow you to create customized aggregations of the survey results. To use this tool, simply select the desired search criteria and then click "Build Report". Created reports can be exported to Excel once they have been built.

Note: to protect the confidentiality of individual respondent data, results will not be displayed when the sample size of a chosen search is less than five responses.

Number of Responses Matching Search Criteria : 11

Organization Type:

General Line Firm

Profitability:

High Profit Firms

Net Sales:

All

Number of Locations:

All

☒ Show My Data

[Build Report](#)
[Reset](#)

Searchable Results Application

This application allows more specific information than any single report could reasonably provide. Using the program, users can create their own data cuts to create benchmarks that most closely match their organization.

[Build Report](#)
[Reset](#)
[Export to Excel](#)

Organization Type:
General Line Firm

Profitability:
High Profit Firms

SUMMARY FINANCIAL RESULTS (FIFO BASIS)	Your Data	Responses
Number of Firms Reporting		0
Strategic Profit Model Ratios		
Profit Margin - Before Tax	0.0 %	2.0 %
Asset Turnover	4.0	5.0
Return on Assets - Before Tax	1.0 %	9.0 %
Financial Leverage	2.0	2.0
Return on Net Worth - Before Tax	2.0 %	17.0 %
Sales Performance		
Typical Sales Volume (000s)	\$ 7,527,312	\$ 6,143,775
Sales Change (2017 To 2018)	7.0 %	31.0 %
Income Statement (% of Revenue)		
Net Sales	100.0 %	100.0 %
Cost of Goods Sold	83.0 %	72.5 %
Gross Margin	29.0 %	30.0 %
Operating Expenses:		
Sales and Marketing Expenses	11.0 %	10.7 %
Delivery Expenses	2.0 %	2.5 %
Warehouse Expenses	2.0 %	1.6 %
Occupancy Expenses	2.0 %	1.3 %
Information Technology Expenses	2.0 %	1.3 %
General & Administrative Expenses	8.0 %	7.1 %
Total Operating Expenses	27.0 %	25.2 %
Operating Profit	1.0 %	1.4 %



Welcome to the ISA Benchmarking Portal

This year's questionnaire includes 4 main sections (3 are required and 1 is optional, but recommended). You may complete the sections in any order. If you wish to complete the survey offline, [click here to proceed to the offline survey.](#)

The process:

- Begin by clicking one of the survey sections below (most start with "Operations")
- Your data will be saved as you move through the form, using any of these navigation buttons: "save", "previous page", "next page", and "home".
- When you are done with the section, click the box at the bottom of the page to indicate the section is finished. (The status listed under that section's icon will change from "In progress" to "Completed".)
- Once the sections are complete, return to this page and "Audit" your survey.
 - The audit may find questions where you possibly mistyped or misinterpreted a question
 - The audit process is meant to identify possible issues – though you can ignore its messages if you believe that your response is correct.
- When your audit notes are sufficiently resolved, click the "Submit Survey" button to indicate that you are finished with the questionnaire

Note: All information in this site will be securely stored and confidentially maintained by Industry Insights. Your data will be confidentially maintained by Industry Insights.



Operations
Complete



Balance Sheet
Complete



Income Statement
Complete

Offline Survey Page

An offline, Excel version of the questionnaire is available by clicking the link located on the site's Table of Contents Page.



Download



Excel Version

Upload

Once you have completed your survey, select your file and click the "Upload" link.

Select a file.

Browse...

Upload

If you have questions or comments, please contact Scott Hackworth of Industry Insights by phone (614.389.2100 ext. 1).

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Excel Survey Download

The Excel Survey is available for download through by clicking the "Excel Version" link.

2018 ISA Annual Performance Report Survey

Based on 2017 Financial and Operational Data

Balance Sheet

1	a. Was LIFO used in the reported fiscal year?	<input type="radio"/> Yes <input type="radio"/> No
	b. If yes, what was the annual change (+/-) in LIFO reserves?	\$ <input type="text"/>
	c. If yes, what was the total ending LIFO reserve?	\$ <input type="text"/>
2	All unaccounted variances in inventory (shrinkage)	\$ <input type="text"/>
3	Averages Report the sum of 12 month-end balances divided by 12	<div>Average Inventory (net of LIFO reserve if LIFO was used) \$ <input type="text"/></div> <div>Average Accounts Receivable (net after reserve for bad debt) \$ <input type="text"/></div>

Line # Balance Sheet (end of fiscal year)

Assets	
1	Cash & Marketable Securities
2	Accounts Receivable (trade, net after reserve for bad debts)
3	Inventory
4	Other Current Assets
5	Total Current Assets (sum of lines 1 through 4)
6	Total Fixed & Noncurrent Assets (net of depreciation)
7	Total Assets (sum of lines 5 and 6)
Liabilities & Net Worth	
8	Accounts Payable (trade)

Contact Info

Excel Survey Preview

The excel version of the questionnaire is a replica of the online version, complete with definitions and formulas for questions where necessary.

2018 ISA Annual Performance Report Survey

Based on 2017 Financial and Operational Data

Operations

1	Which of the following best describes your organization?		
	<input type="radio"/> General Line Firm (Guidance: sales are widely spread among several or more product categories) <input type="radio"/> Specialty Firm (Guidance: majority of sales comes from 1 or 2 product categories)		
2	Sales by Channel	% of Sales	
	Warehouse Sales	<input type="text"/>	%
	Drop Shipments	<input type="text"/>	%
	Total Sales	0.0	%
Total should equal 100%			
3	Gross Margin by Channel		
	To calculate Gross Margin for this section, Cost of Goods Sold should <u>include</u> freight-in and freight recover, and it should <u>exclude</u> all vendor and buying group rebates		
	Warehouse Sales Gross Margin	Drop Shipments Gross Margin	Gross Margin on Total Sales
	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
4	Sales by Product Category		
	Estimates are acceptable. If you are unable to specify some of your sales, please enter those items as "All Others".		
	Abrasives & Brushes	<input checked="" type="checkbox"/> Bonded, Coated, Wire Brushes	<input type="text"/> %
	Adhesives, Sealants & Tape	<input type="checkbox"/>	<input type="text"/> %
	Bearings	<input type="checkbox"/>	<input type="text"/> %
	Chemicals, Lubricants and Equipment	<input type="checkbox"/>	<input type="text"/> %
	Clamping & Workholding	<input type="checkbox"/>	<input type="text"/> %

Contact Information

Operations

Balance Sheet

Income Statement

Operating Expense Detail

+




Download



rsion

Upload

Once you have completed your survey, select your file and click the "Upload" link.

ISA Financial Benchmark  [Browse...](#)

[Upload](#)

If you have questions or comments, please contact Scott Hackworth of Industry Insights by phone (614.389.2100)

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Browse and Upload

Once the offline survey is completed, users simply select the file using the "browse" option, then click upload.