



# 2020 Engineered Systems DiSC Survey

(Based on 2019 data)

Survey Deadline  
April 15, 2020

**Your data will be treated confidentially by the Mackay Research Group.**  
No one from MHEDA or its staff will have access to individual company data.  
Participant data will be aggregated in a way that prevents identification of any individual company.

Please mail your survey to: surveys@mackayresearchgroup.com or Mackay Research Group, P.O. Box 17668, Boulder, Colorado 80308

- (1) If you would prefer the DiSC survey in Excel, email Taylor Mackay at taylor@mackayresearchgroup.com.
- (2) Questions: Contact Taylor Mackay at Mackay Research Group (720) 890-4255 or email taylor@mackayresearchgroup.com.
- (3) Each participant will receive an individual **Financial Benchmarking Report**. Please type or print clearly.

Name / Title \_\_\_\_\_  
 Company \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 City, State, ZIP Code \_\_\_\_\_  
 Telephone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_  
 Email Address \_\_\_\_\_

1. **Number of employees** (all employees, Full-Time Equivalents, including owner/managers)

Executives (Owners, Senior Level Managers, V.P., etc.) .....	_____	#
Outside Sales / Account Management .....	_____	
Customer Service / Inside Sales / Sales Support .....	_____	
Engineers / Project Management .....	_____	
Service Technicians / Installation, including electricians .....	_____	
All Other Employees, Administrative / Clerical, and employees not included above .....	_____	
<b>Total Employees</b> .....	_____	#

2. **Previous** fiscal year Net Sales (2018) ..... \$ \_\_\_\_\_

3. **INCOME STATEMENT** (12 months of data)

<b>Net Sales</b> (less returns, cash discounts, and allowances) .....	\$ _____
Cost Of Goods Sold (including freight-in, less purchase discounts) .....	_____
<b>Gross Profit</b> (Net Sales - Cost Of Goods Sold) .....	\$ _____
<b>Operating Expenses</b>	
Salaries, Wages, Commissions & Bonuses .....	\$ _____
Payroll Taxes (FICA, unemployment, Workers' Comp., <b>all employees</b> ) .....	_____
Group Insurance (Health/medical insurance, group life. <b>all employees</b> ) .....	_____
Employee Benefits (pension, 401(k) & benefits not mandated by the govt., <b>all employees</b> ) .....	_____
<b>Total Payroll Expenses</b> (salaries + payroll taxes + group insurance + benefits) .....	\$ _____
Occupancy Expenses – Utilities, phone, data lines, rent, bldg. depreciation, insurance, etc. ....	_____
All Other Operating Expenses .....	_____
<b>Total Operating Expenses</b> (Payroll + Occupancy + Other Operating Expenses) .....	\$ _____
<b>Operating Profit</b> (Gross Profit - Operating Expenses) .....	\$ _____
Other Income (interest income, gain on sale of assets, etc.) .....	_____
Interest Expense (exclude mortgage interest) .....	_____
Other Non-Operating Expenses (including extraordinary expenses,) .....	_____
<b>Profit Before Taxes</b> .....	\$ _____

4. **Sales & Costs by Product Category**

**Sales by Revenue Source**

Equipment / Controls / Engineering Revenue / Project Management .....	\$ _____
Service / Maintenance Revenue .....	_____
Installation (Electrical & Mechanical) .....	_____
Other Revenue (any revenue not included above) .....	_____
<b>Total Company Revenue</b> (Should match Net Sales on the Income Statement) .....	\$ _____
<b>Cost of Goods Sold</b>	
Equipment / Controls / Engineering / Project Management Costs .....	\$ _____
Cost of Service/Maintenance (in-house service/maintenance labor or sub-contracted) .....	_____
Cost of Installation (in-house installation labor or sub-contracted) .....	_____
All other cost of goods sold .....	_____
<b>Total Cost of Goods Sold</b> (Should match COGS on the Income Statement) .....	\$ _____