



# Dealer Application

**XCMG must receive all of the following items listed below to process the dealer application.  
If any of the items listed below are missing, processing maybe delayed.**

- |  |  |
|--|--|
| 1. Completed & Signed Dealer Application | 5. Company Balance Statement and Profit & Loss Statement (3 yrs) |
| 2. Company Introduction Summary          | 6. Recent Month Bank Statement                                   |
| 3. Pictures or Plans of Facility         | 7. Map of Sales Territory (List States & Counties)               |
| 4. Articles of Organization              | 8. Go to Market Summary Plan                                     |

## 1. COMPANY INFORMATION

Company Name (DBA):		Date:	
Name of Legal Entity:		State Incorporated In:	
Dealer Principal(s):			
Main Contact:		Email:	
EIN Number:		D-U-N-S Number:	
Website:		Years in Business:	

CORPORATE MAILING ADDRESS		SHIPPING ADDRESS	
Company Name:		Company Name:	
Street Address:		Street Address:	
City:		City:	
State/Prov:		State/Prov:	
Postal Code:	Country:	Postal Code:	Country:
Phone:	Fax:	Phone:	Fax:

## 2. DEALER PRINCIPAL SIGNATURE

_____ Signature	_____ Date
_____ Print Name	

**3.1 DEALER SALES LOCATIONS****DEALER MAIN LOCATION # 1**

Company Name:		Own/Leased/Rent:
Street Address:		Building Total sq ft:
City:		Land Acres:
State/Prov:		Sales Office sq ft:
Postal Code:	Country:	Parts sq ft:
Phone:	Fax:	Service sq ft:
General Mgr.:		Warehouse sq ft:
General Mgr. Phone:	General Mgr. Email:	Total Staff at Branch Location:

**BRANCH LOCATION # 2**

Company Name:		Own/Leased/Rent:
Street Address:		Building Total sq ft:
City:		Land Acres:
State/Prov:		Sales Office sq ft:
Postal Code:	Country:	Parts sq ft:
Phone:	Fax:	Service sq ft:
General Mgr.:		Warehouse sq ft:
General Mgr. Phone:	General Mgr. Email:	Total Staff at Branch Location:

**BRANCH LOCATION # 3**

Company Name:		Own/Leased/Rent:
Street Address:		Building Total sq ft:
City:		Land Acres:
State/Prov:		Sales Office sq ft:
Postal Code:	Country:	Parts sq ft:
Phone:	Fax:	Service sq ft:
General Mgr.:		Warehouse sq ft:
General Mgr. Phone:	General Mgr. Email:	Total Staff at Branch Location:

**3.2 DEALER SALES LOCATIONS****BRANCH LOCATION # 4**

Company Name:		Own/Leased/Rent:
Street Address:		Building Total sq ft:
City:		Land Acres:
State/Prov:		Sales Office sq ft:
Postal Code:	Country:	Parts sq ft:
Phone:	Fax:	Service sq ft:
General Mgr.:		Warehouse sq ft:
General Mgr. Phone:	General Mgr. Email:	Total Staff at Branch Location:

**BRANCH LOCATION # 5**

Company Name:		Own/Leased/Rent:
Street Address:		Building Total sq ft:
City:		Land Acres:
State/Prov:		Sales Office sq ft:
Postal Code:	Country:	Parts sq ft:
Phone:	Fax:	Service sq ft:
General Mgr.:		Warehouse sq ft:
General Mgr. Phone:	General Mgr. Email:	Total Staff at Branch Location:

**BRANCH LOCATION # 6**

Company Name:		Own/Leased/Rent:
Street Address:		Building Total sq ft:
City:		Land Acres:
State/Prov:		Sales Office sq ft:
Postal Code:	Country:	Parts sq ft:
Phone:	Fax:	Service sq ft:
General Mgr.:		Warehouse sq ft:
General Mgr. Phone:	General Mgr. Email:	Total Staff at Branch Location:

**4. BANK REFERENCES****BANK REFERENCE # 1**

Bank Name:

Street Address:

City:

State/Prov:

Postal Code:

Country:

Contact/Rep:

Email:

Phone:

Fax:

**BANK REFERENCE # 2**

Bank Name:

Street Address:

City:

State/Prov:

Postal Code:

Country:

Contact/Rep:

Email:

Phone:

Fax:

**BANK REFERENCE # 3**

Bank Name:

Street Address:

City:

State/Prov:

Postal Code:

Country:

Contact/Rep:

Email:

Phone:

Fax:

**5. TRADE REFERENCES****TRADE REFERENCE # 1**

Company Name:		
Street Address:		
City:	State/Prov:	
Postal Code:	Country:	
Contact/Rep:	Title:	
Email:	Phone:	Fax:

**TRADE REFERENCE # 2**

Company Name:		
Street Address:		
City:	State/Prov:	
Postal Code:	Country:	
Contact/Rep:	Title:	
Email:	Phone:	Fax:

**TRADE REFERENCE # 3**

Company Name:		
Street Address:		
City:	State/Prov:	
Postal Code:	Country:	
Contact/Rep:	Title:	
Email:	Phone:	Fax:

**TRADE REFERENCE # 4**

Company Name:		
Street Address:		
City:	State/Prov:	
Postal Code:	Country:	
Contact/Rep:	Title:	
Email:	Phone:	Fax:

**6. CURRENT MANUFACTURERS**

#	Manufacturer	Years Represented	Annual Unit Sales	% of Dealer Revenue	Current Machine Inventory
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					

Comments:

**7. OWNERSHIP / PARTNER / SHAREHOLDER STRUCTURE**

#	Full Name	Ownership%	Comment
1			
2			
3			
4			
5			
6			

Comments:

**8. DEALER MANAGEMENT**

Position / Title	First Name	Last Name	# Yrs in Industry / # Yrs with	Email
			/	
			/	
			/	
			/	
			/	
			/	
			/	
			/	
			/	
			/	

Comments:

**9. TOTAL DEALER STAFF**

SALES DEPARTMENT		SERVICE DEPARTMENT	
Managers		Managers	
Field Salesmen		Mechanics	
Additional		Additional	
GENERAL & ADMIN DEPARTMENT		PARTS DEPARTMENT	
Managers		Managers	
Field Salesmen		Warehouse	
Additional		Additional	

GRAND TOTAL:

Comments:





## 12. DEALER SERVICE DEPARTMENT

1. Are all their service locations able to handle working on or dispatching field service to handle heavy equipment?

2. Do they have qualified mechanics and what levels of experience?

3. Do they have all the necessary tools to work on our equipment and are they willing to purchase necessary tooling if they don't?

4. What engine certifications does the dealer have?

5. Are they willing to participate or pursue training to improve their mechanics knowledge?

6. Can they have a 48-hour response time to customers?

7. How many Service Trucks in total and how are they equipped?

8. How many warranty administrators are there?

10. Comments:

**13.1 DEALER SERVICE LOCATIONS****DEALER SERVICE LOCATION # 1**

Company Name (DBA):		Shop Size:	Shop Height:
Street Address:		Shop Door Height & Weight:	
City:	State:	Number of Service Tech. & Ave Yrs of Experience:	
Postal Code:	Country:	Crane Inside Shop (Type, Bridge, Jib, Lift Cap. Etc):	
Service Manager Name:		How many Service Trucks are on this location?:	
Service Mgr. Phone:	Service Mgr. Email:		
Comments:			

**DEALER SERVICE LOCATION # 2**

Company Name (DBA):		Shop Size:	Shop Height:
Street Address:		Shop Door Height & Weight:	
City:	State:	Number of Service Tech. & Ave Yrs of Experience:	
Postal Code:	Country:	Crane Inside Shop (Type, Bridge, Jib, Lift Cap. Etc):	
Service Manager Name:		How many Service Trucks are on this location?:	
Service Mgr. Phone:	Service Mgr. Email:		
Comments:			

**DEALER SERVICE LOCATION # 3**

Company Name (DBA):		Shop Size:	Shop Height:
Street Address:		Shop Door Height & Weight:	
City:	State:	Number of Service Tech. & Ave Yrs of Experience:	
Postal Code:	Country:	Crane Inside Shop (Type, Bridge, Jib, Lift Cap. Etc):	
Service Manager Name:		How many Service Trucks are on this location?:	
Service Mgr. Phone:	Service Mgr. Email:		
Comments:			

**13.2 DEALER SERVICE LOCATIONS****DEALER SERVICE LOCATION # 4**

Company Name (DBA):		Shop Size:	Shop Height:
Street Address:		Shop Door Height & Weight:	
City:	State:	Number of Service Tech. & Ave Yrs of Experience:	
Postal Code:	Country:	Crane Inside Shop (Type, Bridge, Jib, Lift Cap. Etc):	
Service Manager Name:		How many Service Trucks are on this location?:	
Service Mgr. Phone:	Service Mgr. Email:		
Comments:			

**DEALER SERVICE LOCATION # 5**

Company Name (DBA):		Shop Size:	Shop Height:
Street Address:		Shop Door Height & Weight:	
City:	State:	Number of Service Tech. & Ave Yrs of Experience:	
Postal Code:	Country:	Crane Inside Shop (Type, Bridge, Jib, Lift Cap. Etc):	
Service Manager Name:		How many Service Trucks are on this location?:	
Service Mgr. Phone:	Service Mgr. Email:		
Comments:			

**DEALER SERVICE LOCATION # 6**

Company Name (DBA):		Shop Size:	Shop Height:
Street Address:		Shop Door Height & Weight:	
City:	State:	Number of Service Tech. & Ave Yrs of Experience:	
Postal Code:	Country:	Crane Inside Shop (Type, Bridge, Jib, Lift Cap. Etc):	
Service Manager Name:		How many Service Trucks are on this location?:	
Service Mgr. Phone:	Service Mgr. Email:		
Comments:			

**13.3 DEALER SERVICE LOCATIONS****DEALER SERVICE LOCATION # 7**

Company Name (DBA):		Shop Size:	Shop Height:
Street Address:		Shop Door Height & Weight:	
City:	State:	Number of Service Tech. & Ave Yrs of Experience:	
Postal Code:	Country:	Crane Inside Shop (Type, Bridge, Jib, Lift Cap. Etc):	
Service Manager Name:		How many Service Trucks are on this location?:	
Service Mgr. Phone:	Service Mgr. Email:		
Comments:			

**DEALER SERVICE LOCATION # 8**

Company Name (DBA):		Shop Size:	Shop Height:
Street Address:		Shop Door Height & Weight:	
City:	State:	Number of Service Tech. & Ave Yrs of Experience:	
Postal Code:	Country:	Crane Inside Shop (Type, Bridge, Jib, Lift Cap. Etc):	
Service Manager Name:		How many Service Trucks are on this location?:	
Service Mgr. Phone:	Service Mgr. Email:		
Comments:			

**DEALER SERVICE LOCATION # 9**

Company Name (DBA):		Shop Size:	Shop Height:
Street Address:		Shop Door Height & Weight:	
City:	State:	Number of Service Tech. & Ave Yrs of Experience:	
Postal Code:	Country:	Crane Inside Shop (Type, Bridge, Jib, Lift Cap. Etc):	
Service Manager Name:		How many Service Trucks are on this location?:	
Service Mgr. Phone:	Service Mgr. Email:		
Comments:			

## 14. DEALER PARTS DEPARTMENT

1. Is there a dedicated Parts Department?

2. What is the name of the Parts System?

3. Are all dealer branches computerized and linked?

4. Is there an electronic invoice for Parts Sales?

5. Are inventory turns tracked by the Parts System?

6. What percentage of Parts to Total do you anticipate spending over the next 3 years (year by year).

7. What is the dollar amount your Parts Department generated for the previous 3 years (year by year)

8. Is your Dealership willing to put in a stocking parts order that will support the floor plan?

9. Is there a rule or percentage you follow to support this action?

10. Is the Parts Department open to training?

12. Is there a dedicated Parts Manager for each location?

11. Do members of your Parts team work in multiple roles / work in multiple Departments within your organization?

13. Is the Parts Manager accountable for the department's financial performance?

14. Does the Parts Department maintain a database that tracks stock Order Ratio, Parts Turnover and Lost Sales?

15. Does the Dealership agree to stock and maintain minimum Stock Order requirement for each model stocked?

Comments:

## 15. PRODUCT TRAINING DEPARTMENT

1. How many Salesmen are at the dealership?

2. What is the average tenure of the dealership's sales team?

3. Is there a class room or meeting room that can accommodate training?

4. Is there adequate shop space for a walkaround in case of weather?

5. Is there a location nearby for running equipment and digging?

6. Is the Dealer willing to send salesmen to XCMG for sales training?

7. Comments:

## 16. DEALER MARKETING DEPARTMENT

General	1.1 How many employees are assigned to Marketing Activities?
	1.2 What regional publications does the Dealer participate in?
	1.3 Are marketing activities outsourced to a 3rd party?
	1.4 Does the Dealer have literature racks for XCMG?
	1.5 Is the dealer willing to participate in a XCMG Signage Audit?
	1.6 Does the dealer have a showroom for XCMG Equipment?
Marketing Budget	2.1 What is the total annual budget for Marketing?
	2.2 What is the planned total annual marketing budget for XCMG?
	2.3 What is the annual budget for print publications?
	2.4 What is the annual budget for digital marketing?
	2.5 How much is allocated toward SEO?
	2.6 How much is allocated for social media spend per month?
Online Marketing	3.1 Is there a website for XCMG Equipment?
	3.2 Is the website mobile friendly?
	3.3 When was the website last redesigned or updated?
	3.4 What is the monthly unique visitor count for the website?
	3.5 Who is responsible for managing the website?
	3.6 Is the Dealer willing to create a new XCMG branded website?
	3.7 Does the Dealer publish weekly or monthly E-newsletters for customers?
	3.8 Is the Dealer actively managing online reviews?

**16. DEALER MARKETING DEPARTMENT**

Social Media	4.1 List all Social Media platforms Dealer is Active in.
	4.2 How many Posts per week is scheduled?
	4.3 Has the dealer collaborated with a social media influencer?
Lead Generation	5.1 List the Dealer's CRM System
	5.2 Does the Dealer have access to EDA?
	5.3 What percent of retail sales is attributed to Online Leads?
Comments	



## 17. DEALER APPLICATION REQUIRED DOCUMENTS

1. Completed & Signed Dealer Application
2. Company Introduction Summary
3. Pictures or Plans of Facility
4. Articles of Organization
5. Financial Statements: 3 years Company Balance Statement and Profit & Loss Statement
  - CPA reviewed & prepared with notes
  - If the dealer does not have 3 years financials, please provide all monthly financials available as of the application date.
6. Most Recent Month Bank Statement
7. Map of Sales Territory (List States & Counties)
8. Go To Market Summary Plan

**\*If the dealer application has been approved, the following documents will be required.**

9. Company W-9
10. Sales and Use Tax Certification of Exemption
11. Insurance Certificate
  - Insurance Certificate listing XCMG USA as Loss Payee and Additional Insured for liability \$3,000,000 aggregate and \$1,000,000 per occurrence.

## 18. RETURN DOCUMENTS

Please return the dealer application signed with initials on each page.  
Mail dealer application and documents to:

XCMG NORTH AMERICA CORPORATION  
Attention: Legal Administration Dept.  
5145 Schirlls St.  
Las Vegas, NV 89118