

Food Processing & Manufacturing Sales Call Pre-Plan

Account Information

Plan Date: _____ Visit Date: _____

Account Name: _____ Main Buyer: _____

Phone: _____ Best time to call: _____ Email: _____

Address: _____

City: _____ State: _____ Zip: _____

Type Of Call

- | | | |
|---|--|--|
| ☐ New Account | ☐ New Shop/Dept. - (See Side 2) | ☐ Dormant Account |
| ☐ Revisit Shop/Dept. | ☐ Upper Mgmt. Call | ☐ Purchasing Call |

Products to Show

_____	_____
_____	_____
_____	_____

Notes

Product Demos

Section	Part Number	Product
1 _____	_____	_____
2 _____	_____	_____
3 _____	_____	_____

Service /Equipment Maintenance

Special Programs

- | | | | | |
|------------------------------|---|--------------------------------------|-------------------------------------|---------------------------------|
| ☐ OPP | ☐ Loyalty Discount | ☐ Email Blast | ☐ Work Order | ☐ Survey |
|------------------------------|---|--------------------------------------|-------------------------------------|---------------------------------|

Close

Next Appt Date: _____ Time: _____

Customer Referral: _____ New Agent Referral: _____



EXCEPTIONAL PRODUCTS, SERVICE AND INNOVATIVE SOLUTIONS

5250-A Naiman Parkway . Solon . OH 44139

040111

1-800-BUY-BOLT . Fax: 631-567-2418 . www.chromate.com

P/N 21321

Where and Who to Sell



LOCATION	WHO TO SEE	LEAD ITEMS
Purchasing	Purchasing Manager Name: _____	Phone: _____
Maintenance/Engineering	Maintenance Superintendent Name: _____	Drill-Tap Combo, Security Bit Driver Phone: _____
Safety	Safety Head Name: _____	Smart Washer, First Aid, Safety Glasses Phone: _____
Electrical	Lead Electrician Name: _____	Pro Drills™, RazorQwik™, Thread Restorer, Sure Seal Phone: _____
Plumbing	Lead Plumber Name: _____	Pro Drills™, RazorQwik™, Auto Load Knife, Ratchet Pipe Cutter Phone: _____
HVAC	Lead Mechanic Name: _____	Pro Drills™, Thread Restorers, RazorQwik™ Phone: _____
I&E (Instrumentation & Electronics)	Shop Lead Name: _____	Pro Drills™, LED Lights Phone: _____
Tow Motor/Forklift	Head Mechanic Name: _____	Pro Drills™, LED Lights Phone: _____
Packaging	Maintenance Head Name: _____	Pro Drills™, LED Lights Phone: _____
Refrigeration/Cold Storage	Lead Mechanic Name: _____	Pro Drills™, LED Lights Phone: _____
Fleet/Truck Shop	Head Mechanic Name: _____	Pro Drills™, RazorQwik™ Phone: _____



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