

Mass Transit & Fleet • 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

050112

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

LIT00003

Where and Who to Sell



LOCATION	WHO TO SEE	LEAD ITEMS
Purchasing	Purchasing Manager Name: _____	Phone: _____
Safety	Safety Head Name: _____	Retract-A-Belt, CIC Medical Catalog, Safety Glasses Phone: _____
Parts Dept / Storeroom	Shop Lead Name: _____	Red Walls, Electrical, Grade 8, 10.9 Metric Phone: _____
Service Department	Service Manager Name: _____	Drills, taps, shop supplies, Smart Washer, Absorbents, Reflective tape, Electrical, Weather pak connectors, Phone: _____
Tire Shop	Shop Manager Name: _____	Tire repair, Leak Detective Phone: _____
Wash Bay/Prep Dept.	Manager Name: _____	Prep Solve, Trim Black, Truck and Bus protectant, High Gloss Wash Phone: _____
Maintenance	Maintenance Superintendent Name: _____	Drill-Tap Combo, Security Bit Driver Phone: _____
Facilities, Grounds, Bridges	Facilities Manager Name: _____	Pro Drills™, Security Bit Driver, Fusion Seal Phone: _____
Skilled Trades Shops	Lead Carpenter Name: _____	Pro Drills™, Anchors , Recip Saw Blades Phone: _____
	Lead Electrician Name: _____	Pro Drills™, RazorQwik™, Thread Restorer, Sure Seal Phone: _____
	Lead Plumber Name: _____	Pro Drills™, RazorQwik™, Auto Load Knife, Ratchet Pipe Cutter Phone: _____
Machine Shop	Head Mechanic Name: _____	Pro Drills™, Taps, End mills, Razor Quiks, Porta Mag Drills, Tool Lube Phone: _____
Locomotive / Engine Repair	Head Mechanic Name: _____	Smart washer, Drills taps, Fusion seal Phone: _____
HVAC	Head Mechanic Name: _____	AC Die Kits, O-rings, Drills Taps, Fusion Wrap Phone: _____
Rail Maintenance	Manager Name: _____	Track mats, Pro Drills™, Reamers Phone: _____
Signal Shop	Shop Foreman Name: _____	Phone: _____
Car Shop	Shop Foreman Name: _____	Phone: _____
Roadway Equip/Roundhouse	Name: _____	Phone: _____



EXCEPTIONAL PRODUCTS, SERVICE AND INNOVATIVE SOLUTIONS

5250-A Naiman Parkway . Solon . OH 44139

050112

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

LIT00003