

# Power, Energy & Utilities • 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

010112

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

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# 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: _____
Turbine Deck	Deck Supervisor Name: _____	Pro Drills™, RazorQwik™, Thread Restorer, Leak Detective Phone: _____
Yard	Yard Supervisor Name: _____	Retract-A-Belt Phone: _____
I&E (Instrumentation & Electronics)	Shop Lead Name: _____	Pro Drills™, LED Lights Phone: _____
Tool Crib	Shop Lead Name: _____	Nuts, Bolts, Full MRO Supplies, Red Wall Phone: _____
Fleet & Equipment	Head Mechanic Name: _____	Pro Drills™, RazorQwik™ Phone: _____
Welding	Lead Welder Name: _____	Auralloy, IPP Catalog Phone: _____
Electrical	Lead Electrician Name: _____	Fusion Wrap, 6-1 Shrink Tubing, Wire Marker Set Phone: _____
High Voltage	Lead Electrician Name: _____	Lug Terminals, 6-1 Shrink Tubing, High Temp Terminals Phone: _____
Mechanical	Lead Mechanic Name: _____	Pro Drills™, RazorQwik™, Thread Restorer, Leak Detective Phone: _____
Motor Repair	Lead Mechanic Name: _____	Pro Drills™, Taps, Tool Cool II, Tool Lube Phone: _____
Line Maintenance	Maintenance Head Name: _____	Pro Drills™, Taps, Tool Cool II, Tool Lube Phone: _____
Security	Safety Head Name: _____	Retract-A-Belt, LED Lights Phone: _____
Meter Repair	Shop Lead Name: _____	Pro Drills™, Shrink Tubing, Electric Terminals Phone: _____



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