

School, College & University 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

090112

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: _____	Location: _____ Email: _____
Maintenance	Maintenance Superintendent Name: _____ Phone: _____	Drill-Tap Combo, Security Bit Driver Location: _____ Email: _____
Custodial Department	Head Custodian Name: _____ Phone: _____	Drill-Tap Combo, Security Bit Driver Location: _____ Email: _____
Skilled Trades Shops	Lead Carpenter Name: _____ Phone: _____	Pro Drills™, Anchors, Recip Saw Blades Location: _____ Email: _____
	Lead Electrician Name: _____ Phone: _____	Pro Drills™, RazorQwik™, Thread Restorer, Sure Seal Location: _____ Email: _____
	Lead Plumber Name: _____ Phone: _____	Pro Drills™, RazorQwik™, Auto Load Knife, Ratchet Pipe Cutter Location: _____ Email: _____
	HVAC Name: _____ Phone: _____	Pro Drills™, RazorQwik™, Auto Load Knife, Ratchet Pipe Cutter Location: _____ Email: _____
	Locksmith Name: _____ Phone: _____	Pro Drills™, RazorQwik™, Auto Load Knife, Ratchet Pipe Cutter Location: _____ Email: _____
	Boiler Plant	Chief Name: _____ Phone: _____
Buildings and Grounds	Head Grounds Keeper Name: _____ Phone: _____	Pro Drills™, Security Bit Driver, Fusion Seal Location: _____ Email: _____
Fleet/Garage	Head Mechanic Name: _____ Phone: _____	Pro Drills™, RazorQwik™ Location: _____ Email: _____
Athletic Dept	Athletic Director Name: _____ Phone: _____	Pro Drills™, Security Bit Driver, Fusion Seal Location: _____ Email: _____
Public Safety/Parking	Head of Dept. Name: _____ Phone: _____	Pro Drills™, Security Bit Driver, Fusion Seal Location: _____ Email: _____



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