

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

070111

1-800-BUY-BOLT . Fax: 631-567-2418 . www.chromate.com P/N 21333

Where and Who to Sell



LOCATION	WHO TO SEE	LEAD ITEMS
Purchasing	Purchasing Manager Name: _____	Phone: _____
Electrical	Lead Electrician Name: _____	Fusion Wrap, 6-1 Shrink Tubing, Wire Marker Set Phone: _____
Mechanical	Lead Mechanic Name: _____	Pro Drills™, RazorQwik™, Thread Restorer, Leak Detective Phone: _____
Vibration Control	Lead Electrician Name: _____	Vi-LOC Washers, Pro Shield Fasteners, Leak Detective Phone: _____
HVAC	Lead Mechanic Name: _____	Weatherhead EZ Clips, Copper Fittings, A/C Products, A/C Dies Leak Kit Phone: _____
Plumbing	Lead Plumber Name: _____	Shark Bites, Teflon Tapes, Ratchet Pipe Cutter Phone: _____
Tool & Die	Lead Mechanic Name: _____	Pro Drills™, Taps, Tool Cool II, Tool Lube Phone: _____
Carpentry	Lead Carpenter Name: _____	Mad Max Screws, Wood Spade Drills Phone: _____
Welding	Lead Welder Name: _____	Auralloy, IPP Catalog Phone: _____
Safety	Safety Head Name: _____	CIC Medical Catalog, Safety Glasses Phone: _____
Tool Crib	Shop Lead Name: _____	Nuts, Bolts, Full MRO Supplies, Red Wall Phone: _____
Machine Shop	Head Mechanic Name: _____	Pro Drills™, Taps, Tool Cool II, Tool Lube Phone: _____
Truck Shop	Head Mechanic Name: _____	Fleet Section Phone: _____
Robotics	Head Mechanic Name: _____	CIC 200™ Pro-Shield™ - Slag resistant properties Phone: _____
High Voltage	Lead Electrician Name: _____	Lugs/terminals, 6 - 1 Shrink Tubing, High Temp Terminals Phone: _____
Power Plant	Plant Manager Name: _____	Lugs/terminals, 6 - 1 Shrink Tubing, High Temp Terminals & Anchors Phone: _____
Waste Water	Lead Mechanic Name: _____	Stainless Steel Fasteners, CIC 200™ Pro-Shield™ Fasteners Phone: _____



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