PROSPECT FILE

NEW ☐ UPDATE ☐ FOLLOW-UP DATE _____

COMPANY NAME _____

CONTACT _____ TITLE _____

ADDRESS _____

_____

TELEPHONE # _____ FAX # _____

MARKET SEGMENT _____

CALL-IN ☐ REFERRAL ☐ REFERRED BY _____

CURRENT SUPPLIER _____

APPROXIMATE VOLUME (MONTHLY) _____

FORM LETTERS SENT _____

MATERIAL SENT _____

SALES CALLS (DATE AND SUMMARY) _____

_____

_____

_____

DATE AND SUMMARY OF LAST DISCUSSION _____

_____

_____

DESIRABILITY AS CLIENT: VERY HIGH ☐ HIGH ☐ MEDIUM ☐ LOW ☐

GENERAL COMMENTS _____

_____

_____