

Customer Profile

Company Overview -

- **Description of Business**
- **Corporate Mission**
- **Business Direction**
- **Corporate Objectives/ Stated Goals**



Competitive Overview

- **Competitors**
- **Competitive edge**
- **Obstacles**



Business Relationship with Your Organization

- **Account History**
- **Buying Patterns**
- **Most Recent Business Results**



Company's Buying Profile

- **Strategy**
- **Objectives**
- **Needs**
- **Requirements**



Customer's Current Situation

- **Commitments?**
- **Equipment?**
- **Locations?**
- **Get all the facts!**



Budget/Buying Process

- **What is the decision making process?**
- **When does the fiscal year begin?**
- **What are the obstacles?**



BOB JONES **2048**

DATE _____

PAY TO THE ORDER OF _____ \$

_____ DOLLARS

FIRST NATIONAL BANK

⑆00 2100 661: 770 ⑆ 964076 ⑆ 2121

Personal Closure

- **Acknowledgement of success**
 - or lessons to be learned
- **Celebration of achievement**
- **Remuneration**
- **Incentive for the next opportunity**

