

Client Checklist

By filling out this checklist, our team can better determine how we can assist your company.

Please feel free to attach additional information (such as a price list or brochures) that you feel will help us in accurately preparing a proposal.

Contact Information

Company Name

Contact Name

Title

Email Address

Website Address

Telephone

Mobile

Fax

Address

Address

City / Town

Postal Code

Offices – Please list primary and remote office locations

Primary Office

Other Office

Other Office

Other Office



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Please Answer The Following Questions:

► List of products and/or services available (or soon to be available) for sales & marketing efforts (attach additional information in necessary):

► Provide typical pricing structure for products listed above including upfront, license, custom development, support, ongoing and renewal costs (attach additional information in necessary):

► Number of employees dedicated full-time to selling products? _____
 ► Number of employees dedicated part-time to selling products? _____

► Number (quantity) of Sales in previous:
 30 days _____ 60 days _____ 90 days _____ 12 months _____

► Estimated Revenue from Sales in:
 30 days _____ 60 days _____ 90 days _____ 12 months _____

► Marketing Cost to support above Sales and Revenue in:
 30 days _____ 60 days _____ 90 days _____ 12 months _____

► What are your upcoming:
 Revenue Goals for next: Sales Goals for next:
 1 month? _____ 1 month? _____
 3 months? _____ 3 months? _____
 12 months? _____ 12 months? _____

► How many airline trips does your sales team currently make per yr? _____

► What is your sales/marketing budget for the current year? _____

► Who do you consider to be your top competitors in:
 United States: Other Countries:
 1. _____ 1. _____
 2. _____ 2. _____
 3. _____ 3. _____
 4. _____ 4. _____
 5. _____ 5. _____

► How quickly would you like to begin experiencing a significant increase in sales/market penetration if conditions were right?
 1-2 months _____ 2-4 months _____ 4-6 months _____ 6+ months _____

All data contained within this document will be treated as confidential and will not be disclosed, copied or disseminated in any way.

