

Mass Transit & Fleet • 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

050112

1-800-BUY-BOLT . Fax: 631-567-2418 . www.chromate.com

Where and Who to Sell



LOCATION

WHO TO SEE

LEAD ITEMS

Purchasing

Purchasing Manager

Name: _____

Phone: _____

Safety

Safety Head

Name: _____

Retract-A-Belt, CIC Medical Catalog, Safety Glasses

Phone: _____

Parts Dept / Storeroom

Shop Lead

Name: _____

Red Walls, Electrical, Grade 8, 10.9 Metric

Phone: _____

Service Department

Service Manager

Name: _____

Drills, taps, shop supplies, Smart Washer, Absorbents,
Reflective tape, Electrical, Weather pak connectors,

Phone: _____

Tire Shop

Shop Manager

Name: _____

Tire repair, Leak Detective

Phone: _____

Wash Bay/Prep Dept.

Manager

Name: _____

Prep Solve, Trim Black, Truck and Bus protectant, High Gloss Wash

Phone: _____

Maintenance

Maintenance Superintendent

Name: _____

Drill-Tap Combo, Security Bit Driver

Phone: _____

Facilities, Grounds, Bridges

Facilities Manager

Name: _____

Pro Drills™, Security Bit Driver, Fusion Seal

Phone: _____

Skilled Trades Shops

Lead Carpenter

Name: _____

Pro Drills™, Anchors, Recip Saw Blades

Phone: _____

Lead Electrician

Name: _____

Pro Drills™, RazorQwik™, Thread Restorer, Sure Seal

Phone: _____

Lead Plumber

Name: _____

Pro Drills™, RazorQwik™, Auto Load Knife, Ratchet Pipe Cutter

Phone: _____

Machine Shop

Head Mechanic

Name: _____

Pro Drills™, Taps, End mills, Razor Quiks, Porta Mag Drills, Tool Lube

Phone: _____

Locomotive / Engine Repair

Head Mechanic

Name: _____

Smart washer, Drills taps, Fusion seal

Phone: _____

HVAC

Head Mechanic

Name: _____

AC Die Kits, O-rings, Drills Taps, Fusion Wrap

Phone: _____

Rail Maintenance

Manager

Name: _____

Track mats, Pro Drills™, Reamers

Phone: _____

Signal Shop

Shop Foreman

Name: _____

Phone: _____

Car Shop

Shop Foreman

Name: _____

Phone: _____

Roadway Equip/Roundhouse

Name: _____

Phone: _____



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