



Key Account Sales Presentation Checklist

Please have the below information filled out prior to the initial internal meeting

General Opportunity Info:

Sales Rep:

Account:

Date of the Request:

Date of Meeting:

Buyer:

Category:

Type of Opportunity (Seasonal, Promo, In-Line, Endcap, etc.):

How will the opportunity be quoted (Domestic, DI, etc.):

POG/Endcap size:

Estimated Product Ship Date:

Estimated Product Set Date:

Address and person to ship samples to:

Date samples must arrive by:

Number of copies of the presentation needed:

Date presentation, pricing and any other materials must arrive by:

Does information about the products need to be loaded in the customer portal or filled in on a new item form prior to the meeting: Yes No

If yes, please provide detail

- If samples of products in development are not available, which of the following can be sent in its place (*please circle one*)—**product rendering, material sample, flat placeholder or mock up**?
 - From the above, will packaging or packaging rendering be required?

Yes	No
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- Do any of the samples need to be sent with props? Yes No
If yes, please note which items

- Will an image of the products planogrammed be needed? Yes No

- Will any of the products be in the customers' private label? Yes No
If yes, please note which items

- Will you need a rendering and/or a photo of a proposed POG/Endcap? Yes No

- Do samples need to be labeled per a customer requirement? Yes No
If yes, please provide detail

- Do you need return shipping labels for the samples? Yes No

Results/Outcome: