

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

If yes, please provide detail

PRODUCT SELECTION/SAMPLES:

Existing Products: Please list items you would like to propose in the below table. Additions and edits will be made by marketing and a final spreadsheet of selected items will be sent to VP of each division to input pricing.

Products in Development: Please list items you would like to propose in the below table. Products in development will need approval of the division VP to be presented, please send a list for approval prior to the initial meeting.

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Item	Bass is the	Send Sample?
Number	Description	Y or N
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- 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
- 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: