



## Preliminary Relationship Discussion

### **A: General Information**

Legal Business Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Main Contact: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_ Website \_\_\_\_\_

### **B: Business Plan**

What type and brand of reliability products do you currently sell?

\_\_\_\_\_

Services Offered: \_\_\_\_\_

\_\_\_\_\_

Locations (Include Branch Offices): \_\_\_\_\_

\_\_\_\_\_

Geographical Coverage: \_\_\_\_\_

\_\_\_\_\_

Industries/Companies Served: \_\_\_\_\_

\_\_\_\_\_

Current Filtration products offered: \_\_\_\_\_

\_\_\_\_\_

#### **Sales Strategy:**

Estimated sales volume (in \$) are you forecasting for Y2K Filtration products: \$ \_\_\_\_\_

Marketing plan you intend to use in order to meet your forecast:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

#### **Internal use only**

Salesperson Code: \_\_\_\_\_

Date Credit Check Completed: \_\_\_\_\_

Assigned Credit Limit: \_\_\_\_\_

P21 Account #: \_\_\_\_\_