

LEAD SHEET

| |
|--|
| Document No: <u>SM10.2</u> Date: <u>13/07/99</u> |
| {Today's Date?} |
| Approved By: _____ <i>sk</i> |

Sales Person: _____ Lead Source: _____

Competitors: _____

Company:
Contact:
Position:
Address:

Phone: _____ **Fax:** _____
Email: _____

Product: **Objective:** *to sell....*

| | | |
|--|--|--|
| All services <input type="checkbox"/> | | |
| Forwarding services <input type="checkbox"/> | Export Air services <input type="checkbox"/> | Import Air services <input type="checkbox"/> |
| Customs services <input type="checkbox"/> | Export Sea services <input type="checkbox"/> | Import Sea services <input type="checkbox"/> |

Steps:

1. **Contact:**
 Initial Phone Contact Appointment Made Date: _____
 Follow Up Required Date: _____

2. **Needs: *Establish....***

| | | |
|---|---|--|
| 1 - Decision Maker 2 - Prospects Requirements 3 - Awareness of ITM Services | 4 - Problem Identification 5 - Initial Meeting | Done: <input type="checkbox"/> Date: _____ |
|---|---|--|

3. **Prepare Quote:**
 Gather all relevant quote information Done: Date: _____

4. **Confirm Rates:**
 Confirm that all rates are current and relevant Done: Date: _____

5. **Peer Review:**
 Quote accuracy checked by peer Done: Date: _____
 Quotation complies with Quotation Procedure Done: Date: _____

6. **Presentation Appointment:**
 Make an appointment for presentation of quote Done: Date: _____

7. **Present Quote:** Appointment Date: _____ Time: _____
 Present quotation to client and close sale Done: Date: _____

This Lead Was: **Won** **Lost** **Abandoned**

Comments: _____

Check List: *Ensure the following documents are completed and received by ITM P/L prior to movements*

| | | | |
|---------------------------|-----------|--|-----------|
| Credit Application | | Authorisation & Acknowledgment (Customs Clearance Only) | |
| Recv from Client: | Date: / / | Recv from Client: | Date: / / |
| To accounts: | Date: / / | To Customs: | Date: / / |
| Response Filed: | Date: / / | Response Filed: | Date: / / |