

## Key Customer/Prospect Information(KCPI)

**Company name:**

Other Trade Styles/ divisions

Full Address:

Country:

Telephone:

Fax:

www.

**Subsidiary of** (when applicable)

Give details on the parent company:

Part of the Group of:

Other divisions & subsidiaries:

**Name of Main Contact 1:**

Business telephone:

Home Telephone:

Business Fax:

Email address:

**Name of Contact 2:**

Business telephone:

Home telephone:

Business Fax:

Email address:

**Name of Contact 3:**

Business telephone:

Home telephone:

Business Fax:

Email address

## Key Personnel

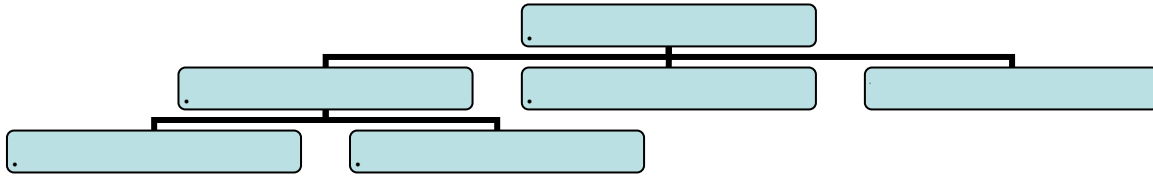
List all contacts including decision makers, users, technical persons, economic person, coach, assistants etc...

Name	Position	Tel./email	Notes
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			

D	Decision maker	<b><u>Level of support</u></b>
U	User	H High
T	Technical person	M Medium
C	Coach	L Low
E	Economic person (\$)	

## ORGANIZATION:

(Draw a quick organization chart showing where key personnel are)



## Information on key personnel:

Provide information on each decision maker i.e. Bill Smith is the decision maker. As Senior VP he is interested in the economics of the deal. He is in this position since 1992. Previously with ABC company Ltd. Likes our company and is a good supporter of our products & services. Does not discuss price much, concentrates on service details. Likes to be informed of what is going on. Frequency of contacts is about once every two months. Delegates day to day to John Doe, VP Operations and relies on Susan Grade for technical info. He reports to Alexander Great, the President. Bill is married with two children. Enjoys golf and reads history books. He enjoys Italian food.

Information on Key personnel, continued,

## **Company Profile:**

Describe industry, activities, annual sales, employees, profitability etc. (attach D&B Report, articles from newspapers and trade publications, customer internal documents, website info, other info etc.)

## **Strategic environment, business trend, market place, their competition:**

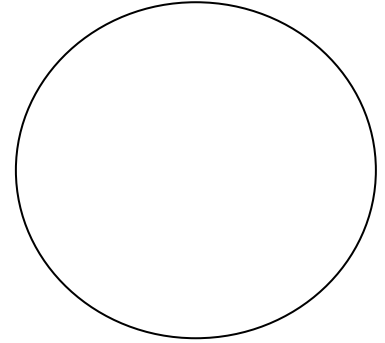
Describe the strategy of this business and comment on their trend of sales and profits. Are they winning, losing or just holding their own. What are the major challenges facing the business? Who are their competitors and how are they doing? Add any other information that would help understand better this business and its market place. List important changes that have or are about to happen with this business.

## **Need(s) analysis and level of satisfaction:**

Identify and list the main needs of this company. List those needs that are presently satisfied by our company and identify potential areas of needs and for additional business. Address short term and long term. Please comment on the level of satisfaction and how good of a job we are doing. Give details as need be and attach any information which is pertinent.

## **Our Competition:**

What is our competition and how are they doing? How/what/where/when/how much/why etc. Is the customer actually using our competition? Give details and estimate dollar and volume of business going to the competition. If the customer is not using the competition, explain the reasons and indicate if this situation can change. Indicate timing and estimate the likely hood of the change. Explain what is being done to improve our market share. List any actions we need to undertake. Attach any information you believe relevant. Complete as best you can the pie showing market share of each competitor.



## **Our Business:**

List sales volumes, quantities, products, services etc. Give comparable numbers whenever appropriate. Are we winning or loosing? Is our business going up, staying flat or is down? What are we doing to improve?

## **Current yearly Plan :**

(Provide yearly plan and milestones for Q1 Q2 Q3 Q4) List dollars and volume, assignments, jobs etc. as need be. List also pertinent events, meetings, annual reviews etc.

## **3 year Plan:**

Describe our business plan with this key customer/prospect. Identify strengths and weaknesses, investments needed, level of services, products etc. for the next 3 years. List the things that need to happen for our plan to work. Include sales projections, volumes, profitability etc. as need be. Include dates and any relevant milestones.

## **Historical Data:**

Record of face to face meetings, field visits, important client events, entertainment events and sales costs, gifts etc.

## **Other information:**

**Prepared/Reviewed by:**

**Date:**

---

- 
- 
- 
- 
- 
- 
- 
-