

## **Customer-Prospect Product Needs Planning Calendar Instructions**

This sales/organizational tool can perform “double duty” as a tool to help both the salesperson and the customer or prospect to better understand the timing of upcoming product needs. It can also serve as an “ad specialty” item to keep your name in front of your customers and prospects.

The best way to use this tool is to schedule a “planning meeting” during which you and your customer or prospect can sit together and look forward through the (rest of the) year to identify both definite and potential printing/forms/signage/promotional products requirements. Things to consider include: trade shows, product releases, changes in benefits programs, annual meetings, sales presentations, newsletters and/or other events which will require printing/forms/signage/promotional products as part of what it takes to support them. One part of your goal is to help your customers and prospects plan ahead in order to avoid rush projects. Another part of your goal is to give you a “running start” on winning the business. It’s pretty well accepted in printing/forms/signage/promotional products sales that the earlier you get involved, the better off you are!

As your customer fills out his/her Planning Calendar, be sure to take notes—perhaps on your own copy of this valuable sales/organizational tool! Don’t forget that you can also personalize this tool with your company name, logo, and contact information!