

Joint Sales Call Checklist - ___/___/___

Customer Company Name:

Vendor Company Name:

Scheduled Date and Time:

**All Participants at Meeting
(Name/Job Title/E-Mail/Phone #)?**

Active Time Spent (Hrs:Mins)?

What Was Discussed?

**What Active Items Were Promised, and
To/By Whom?**

Active Items Completed?

Yes:

No:

Thank You Sent?

Yes:

No: