

\*NEW\* Vendor (Rep): \_\_\_\_\_ Season: \_\_\_\_\_

Meeting Date/Time/Location: \_\_\_\_\_

Meeting Preparation

- Vendor catalog received
- Meeting Scheduled: \_\_\_\_\_ Booth #: \_\_\_\_\_

During Meeting Notes/Questions

- Vendor Background*
  - Year Founded/HQ: \_\_\_\_\_
  - # National Accounts/Annual Growth: \_\_\_\_\_
  - Existing Local Accounts: \_\_\_\_\_
  - Other: \_\_\_\_\_
- Reviewed Catalog*
  - Notable Products: \_\_\_\_\_  
\_\_\_\_\_
  - Possible Shop Layout Location: \_\_\_\_\_
  - Size/Fit: \_\_\_\_\_
  - Embroidery: \_\_\_\_\_ \$/unit: \_\_\_\_\_
  - Trends: \_\_\_\_\_
  - SOs/One-off Availability: \_\_\_\_\_
  - Pricing Negotiations (emb., freight, invoice dating, etc.): \_\_\_\_\_
  - Staff Allocation: \_\_\_\_\_
  - Trunk shows/demo days/product training: \_\_\_\_\_

Meeting Review/Follow-Up Tasks

- Proposal Received
  - Proposal edits finalized/sent to vendor
    - Final sales order confirmed and attached

