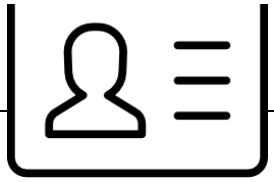
Visit Report – No.

Attach business card here



Mr/Mrs: _____

I. Company data

Company size: _____

Estimated turnover: _____

Valuation/Scoring: _____

Is already customer: yes: ☐ no: ☐

II. Communication

Discussion atmosphere: _____

Reason for the conversation: _____

Contact person: _____ Duration: _____

III. Customer interest

Customer is interested in...

…Product: _____ Quantity: _____

…Product: _____ Quantity: _____

…Product: _____ Quantity: _____

Opportunities (project case): _____

Risks (project case): _____

What has the customer/interested party already received?

☐ Information material ☐ Online demo ☐ Price list ☐ Miscellaneous

_____

What has been agreed with the customer/interested party?

☐ Send offer ☐ Appointment ☐ Miscellaneous

_____

IV. Talk notes

_____

_____

_____

_____

Date: _____ Signature: _____