

GENERAL OBSERVATIONS

1. Prepare for the sales call - investigate the company, its reputation, the industry it operates in, competitors, and customers.
2. On the call, learn about management's goals, strategies, customers, SWOTS.
3. Take every opportunity to visit the company location, tour production facilities, talk with as many members of the management team as you can to get a flavor for the business;
4. Engage the internal accounting staff (CFO, Controller, accountant) and gather as much information about the financial statements.

SERVICE WALK THRU

What is production cycle?	What types of services are performed??	Are different services provided?
What are staffing levels?	What productivity measures are tracked?	How does management diversify product mix, customers, etc?

PRODUCTION / MANAGEMENT WALK THRU

What is produced and what is product mix?	How is inventory changed from raw material thru finished goods?	Does company use perpetual or physical inventory methods?
Is inventory well organized, clean, or dusty?	Is receiving & shipping organized?	Are finished goods gathering dust?
Are employees productive?	What KPI does company track?	Returns / scrap / Overtime?

