

Sales materials checklist

Start with what you have. Discuss a sales workflow that fits your business.

01 Knowledge and sales policies

☐ **Company and business**

Company name, brand, factory or service locations, main markets and working languages.

☐ **Product knowledge**

Applications, specifications, compatibility, limits and the answers your team gives to common questions.

☐ **Sales policies**

Lead times, warranty, after-sales terms, concessions and decisions that need a person's confirmation.

02 Products and pricing rules

☐ **Products and configurations**

Model names or SKUs, units, standard inclusions, optional extras and compatibility.

☐ **Prices and calculations**

Currency, price validity, quantity tiers, discount rules, trade terms and what each charge includes.

☐ **Quotations and PIs**

Document layouts, issuer details, payment milestones, validity and approval requirements.

03 Images, documents and languages

☐ **Product photos and videos**

The product shown, subject, intended use, source and permitted uses.

☐ **Sales and technical documents**

Catalogues, specification sheets, relevant certificates or test reports, installation and operating guides.

☐ **Languages and versions**

Originals and existing translations, language and version dates, with current materials identified.

Questions you would like to discuss in the demo

Use existing materials; no special preparation is needed to book. Public or sample requirements are enough for a first discussion.
