



Date:

<b>Company:</b>	<b>People in the Meeting (Title):</b>
<b>Corporate HQ/Other locations:</b>	
<b>Current Carrier(s) – Who/How long?</b>	
<b>Any PROFOUND reason you use (carrier) other than the fact that they get your packages from point A to point B?</b>	
<b>Ever looked into UPS?</b>	

<b>Nature of Shipping</b>	<b># Shipments/week:</b>	<b>\$'s spent/week:</b>
	<b>Domestic destinations:</b>	<b>Inbound domestic?</b>
	<b>Export/import countries:</b>	
	<b>Type of shipments:</b> (Letters/envelopes, paks, boxes, etc...)	

<b>Creating Airbills</b> Process for doing it.	<b>Who prepares?</b> (Done in office, in warehouse, both?)
	<b>How do they do it?</b> (Online, handwrite, standalone, hardware?)
	<b>Capture rate estimate?</b> (Charge customer? Handling charge? How does it get billed?)
	<b>Insure packages?</b> (How often? What is insured? Insurance rate?)
	<b>Inbound/returns?</b> (Who ships to them: vendors or customers? How are those arrangements made?)

<b>Tender Method</b> How it's done.	<b>Method?</b> (Daily pickup, call for pickup, drop box? Is there more than one method?)
	<b>Time?</b> (Are the current arrangements acceptable? More than one pickup time?)

<b>Billing</b> What happens to it.	<b>Who receives?</b> (Accounts receivable, decision maker?)
	<b>What data is important?</b> (Location, department, sender? How many invoices are received?)
	<b>How is important data captured/processed?</b> (Manually summarized?)

<b>Customer Service</b> Recent experience.	<b>Who do you call?</b> (800#)
	<b>Last time you did and why?</b> (Delivery issue, lost package, claim, order supplies?)
	<b>Customer experience?</b> (Auto attendant, poor follow up, erroneous information, slow claims process?)

<b>NEEDS:</b>
Arrange for you...
Furnish you with...
Give you...
Introduce you to...
Provide you with...
Show you how...
Supply you with...