

Quotation Checklist

1. Site Name:

2. Decision Maker's Name:

3. What is the client's main need or pain point?

4. Previous agency name (if any):

5. Reason for switching from previous agency:

6. What rate are they paying the current agency?

7. What rate have you quoted?

8. What is the expected payment cycle?

9. Do you have any strong reference inside the company? Who?

10. Do you share any mutual connection with the decision maker?

11. Who referred you or introduced you (if anyone)?

12. When was the quotation sent?

13. Next follow-up date planned:

14. Any objections or concerns raised by the client?