

PROSPECTING TEMPLATE

GENERAL INFO

Name: _____
 Address: _____
 City: _____
 State: _____ Zip: _____
 Email: _____

Phone 1: _____
 Phone 2: _____
 County: _____
 Decision Maker: _____

PRODUCTION

Commodity	Acres	Yield	Production	Storage	Unsold

Notes:

FARM BASICS

Trucking: ☐ Own Trucks ☐ Contract Trucks ☐ Needs Transportation

Family Info: _____

Farm Info: _____

Farming Practices: _____

Notes:

MARKETING STYLE

Current Customer: ☐ Yes ☐ No

**If "no," currently doing business with:* _____

Marketing Profile Matrix



Conservative						Ambitious
Inexperienced						Market Savvy
Low Risk Tolerance						High Risk Tolerance
Unwilling to Grow/Learn						Willing to Learn/Grow
Transactional						Relationship

Marketing Tools Used:

- ☐ Cash Contract
- ☐ Deferred Price (DP)
- ☐ Basis Contract
- ☐ Futures Only (FO)

Additional Notes: