



HD Prospect Checklist

Pre-call:

1. Gather prospect information:
 - a. Decision Maker/s
 - b. Influencers to the decision maker
 - c. Competition
 - d. Pricing
 - e. What does the market segment forecast?
2. Review prospect website and use other sources (Yelp, Google, LinkedIn etc.) for more information
3. Print appropriate questionnaire from CSRC. Complete all already known information.
<https://castrolsrc.com/heavy-duty/constructionlandfill/construction-landfill-tools/>
 - a. HD Off Road Questionnaire
 - b. HD Transport Offer Questionnaire
 - c. HD Truck Workshop Questionnaire
4. Gather appropriate product and program sell sheets from CSRC to have available at prospect meeting (digital or print copies)

Prospect Meeting:

1. Review Castrol Product offer: Utilize product sell sheets
2. Complete questionnaire: This will provide data to generate a quote
3. Take notes (Tablet)
4. Provide prospect with an overview of key HD Programs:
 - a. Castrol Labcheck
 - b. Fleet Savings Calculator
 - c. Premium Products (Vecton, Dual Range, Pyroplex Blue)
 - d. Fleet Acquisition Program information
 - e. All other necessary programs depending on prospect
5. Establish a timeframe that you will follow-up with the prospect to provide “next step” information

Post Meeting:

1. Work with Castrol TSM to create product and program quote: Use Castrol Proposal Builder in the CSRC
2. Call prospect and setup follow-up meeting to review Castrol offer