

VISIT REPORT TEMPLATE/EXAMPLE

Attendee's:

From our company: Mr XYZ, Account Manager

From customer: Mr ABC, Sourcing Manager, Mr DEF, Technical Manager

Purpose of the visit: Business outlook, Latest quality issues

Agenda points:

- A) Small intro of attendees (mainly for the new technical manager)
- B) Market overview and customer performance
- C) Next year outlook
- D) Latest quality issues

A) Intro of attendee's:

After a quick roundtable intro, mainly to get acquainted with the new technical manager we moved on to the agenda points without rushing, allowing sufficient time to set a cordial ambiance and build personal relationship.

B) Market overview, customer performance:

- Market is quite good. After a begging of the year a bit bullish, it rebounded. Demand is stable at customer side 6kt/year. There's a concern with regards to a proposal of new law currently being discussed at the parliament over plastics. I explained what we're doing in the background together with the industry association to support the customers in this segment.
- Sales are slightly behind target, customer expects to cover the gap in the next two months as demand is expected to remain on the high side. Margin performance is above target. Forecast is that we'll be above target on both volumes and margins.

C) Next year outlook:

- Customer expects a growth of 10% (mainly gaining share from competition, not from market growth as in that side it's expected to remain flat.
- Some of its direct competitors are under financial struggle, that might lead to a stronger growth of market share.
- Customer has been approached by our competitors with tempting offers. They have lost market share in the last two years and are very aggressive to get it back.
- We need to be watchful and start preparing next year proposal to lock the customer at early stage with beneficial conditions to profit from that expected growth.

D) Latest Quality issues:

- Customer was very worried that the product quality was unstable in the last deliveries.

I explained the background and the exceptional character of the period with maintenances and therefore some adjustments that lead to those deviations in our specifications. Taken into account and already stable.

Action points:

- a. Prepare next year draft proposal/offer with an increase of 10% volume. Who: Myself / When: by month X
- b. Confirm with production product quality stability. Put our technical people in direct contact with customer technical department to facilitate dialogue and speed. Who: Our Technical Manager Mr S / When: Current month.