



COMPANY INFORMATION :

COMPANY NAME: _____
STREET ADDRESS: _____ PHONE#: _____
CITY: _____ STATE: _____ ZIP: _____ FAX#: _____
CONTACT: _____ TITLE: _____ E-MAIL: _____

DEALER INFORMATION:

DEALER SALESPERSON: _____ REQUEST DATE: _____
DEALER NAME: _____ PHONE#: _____
CITY: _____ STATE: _____ ZIP: _____ FAX#: _____
E-MAIL: _____

Customer Expectations: (detailed explanation of customers expectations from proposed fleet evaluation)

Is a company "decision maker" engaged in this process? If so, provide name(s) and title(s)

Name(s): _____
Title(s): _____

Does the customer currently have capital money budgeted for new fork lift purchases? _____

COMPETITION

What supplier(s) is our primary threat in this opportunity? _____

In your opinion, what will be our biggest obstacle in meeting customers expectations (competition, price, product, service, fleet capabilities, etc)?

HOOR METERS:

Percent of fleet with working hour meters ☐ % Do they maintain a log of regular hour meter readings and dates they were recorded? _____

*IMPERATIVE:

Accurate usage is the single most important element in developing a fleet strategy and working with assumptions/estimates provides minimal credibility when making fleet recommendations. Therefore, if meter information is NOT available it is our opinion it is not a good use of our fleet resources and the request will be denied

If meter information is available continue with the following:

FLEET INFORMATION:

What is the total number of lift trucks in your current lift truck fleet? _____ What year did they last purchase new equipment _____

What is the estimated average age of your current fleet? _____ What brand was purchased _____

Are multiple locations involved in this project? _____ If so, how many? _____

Do you lease or own your current lift truck fleet?

☐ Lease ☐ Own ☐ Both If both, what is the estimated mix? ☐ % Lease ☐ % Own

How many rental units do you currently have in your fleet? _____ Short-Term _____ Long-Term

Explain current replacement criteria used to justify new equipment _____

MAINTENANCE PRACTICES

How do you currently handle your equipment maintenance needs? ☐ Internal Maintenance ☐ Outsourced Maintenance

Do you currently track your lift truck maintenance expenditures? ☐ YES ☐ NO

Do you currently track costs associated with avoidable damage for your lift truck fleet? ☐ YES ☐ NO

Do you currently have a comprehensive Periodic Maintenance (PM) program in place for your fleet? ☐ YES ☐ NO

If so, is it scheduled on an hourly or calendar basis? _____