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Commercial agreement discussion worksheet

Record proposed terms and open questions before preparing an agreement. Complete this discussion outline with the relevant company representatives.

1. Company and contacts

Supplier / manufacturer legal name: _____

Proposed local company legal name: _____

Company addresses and countries: _____

Decision makers and authorized representatives: _____

Meeting date and contact information: _____

Relationship objective: _____

2. Products and opportunity

Confirmed product categories: _____

Confirmed manufacturers and models: _____

Target customers and projects: _____

Proposed territory: _____

Portfolio and documentation supplied: _____

Items still to verify: _____

3. Proposed relationship

Representation, distribution, procurement, or project support: _____

Scope and limits of appointment: _____

Exclusive or non-exclusive proposal: _____

Conditions and exceptions to discuss: _____

Customer communication and marketing permissions: _____

4. Pricing and orders

Pricing structure and currency: _____

Quotation validity: _____

Minimum order quantities, if proposed: _____

Purchase-order process and acceptance: _____

Payment method and milestones: _____

Credit arrangements, if proposed: _____

5. Shipping and delivery

Proposed delivery location and timing: _____

Shipping and freight responsibility: _____

Insurance responsibility: _____

Customs and import coordination contacts: _____

Inspection and acceptance process: _____

Delay and change handling: _____

6. Documentation and regulatory coordination

Applicable product / project requirements to confirm: _____

Manufacturer authorization, where applicable: _____

Supplier documentation owner: _____

Local coordination owner: _____

Specialists or other parties involved: _____

Outstanding documentation and review milestones: _____

7. Installation and after-sales scope

Site readiness and installation responsibilities: _____

User training: _____

Warranty scope and handling: _____

Maintenance and spare-parts coordination: _____

Technical escalation contacts: _____

Service costs and response arrangements to discuss: _____

8. Relationship management

Reporting and forecast arrangements: _____

Performance review process: _____

Confidential information handling: _____

Proposed agreement duration and renewal: _____

Proposed exit arrangements: _____

Handling unresolved commercial issues: _____

9. Decisions and next steps

Agreed discussion points: _____

Open negotiation points: _____

Documents to prepare: _____

Responsible contacts: _____

Target dates: _____

Internal review and authorized approval process: _____