

Trip purpose checklist (30 categories)

Use as reference when filling logs and forms. Adapt to your industry.

A. Sales (5 categories)

1. Sales visit – prospect (low risk): e.g. "Proposal pitch to Acme Corp"
2. Sales visit – active client: e.g. "Contract renewal with Beta Inc"
3. Product demo: e.g. "Demo of product X to Gamma Inc"
4. Price negotiation: e.g. "Closing meeting with Delta Co"
5. Post-sale – NPS review

B. Service (5)

6. Technical service – installation
7. Technical service – preventive maintenance
8. Technical service – emergency
9. On-site quality audit
10. Operational training at client

C. Support (5)

11. Scheduled on-site support
12. New-client onboarding
13. Implementation follow-through
14. Structured feedback collection
15. Critical incident resolution

D. Training (5)

16. Attending external training
17. Delivering training at branch
18. Workshop with strategic partner
19. In-person professional certification
20. Regional team mentoring

E. Logistics (5)

21. Equipment transport (delivery)
22. Equipment transport (pickup)
23. Material pickup at supplier
24. Branch warehouse visit
25. Authorized inter-branch transfer

F. Administrative (5)

26. Authorized public-agency meeting
27. Strategic-partner visit (M&A, JV)
28. Inspection of company property
29. External board or committee meeting
30. Due-diligence diligence on acquisition

