Site visit report card

One visit, one card. Fill it in before you leave the site.

Card no.

Date

1 WHO, WHERE AND WHEN

VISITED BY

CUSTOMER OR SITE

PERSON MET (NAME AND ROLE)

AREA OR ADDRESS

TIME IN

TIME OUT

TIME SPENT

2 PROOF FROM THE SITE

1

Arrival: signboard or entrance, with the name visible

2

The work, the stock or the product you went for

3

Customer's stamp, signature or a handover photo

Location marked from the site? ☐ Yes ☐ No, I was about _____ m away

3 WHY I WENT

☐ Introduction ☐ Demo ☐ Follow-up ☐ Collection ☐ Complaint ☐ Delivery ☐ Survey ☐ Other _____

4 WHAT HAPPENED

THEY ASKED FOR

THEY PUSHED BACK ON

WHAT I FOUND OUT

5 HOW STRONG WAS THIS VISIT (TICK WHAT IS TRUE)

☐ Met the person who decides

☐ Budget or timeline was named

☐ Next step agreed, with a date

☐ Need confirmed in their own words

☐ A competitor came up

Count the ticks: of 5

0 to 1	2 to 3	4 to 5
Courtesy call. Do not count it as progress.	Moving. Decide who owes the next step.	Ready to close. Tell your manager today.

6 PROMISES LEDGER: WHO OWES WHAT

WHO	PROMISE	BY WHEN	DONE
☐ We ☐ They			☐
☐ We ☐ They			☐
☐ We ☐ They			☐
☐ We ☐ They			☐

7 NEXT VISIT

DATE

THE ONE GOAL

BRING

Visitor signature

Customer signature or stamp

Manager reviewed ☐ Date _____

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Plan, proof and review on the phone: zeba.pro/site-visit-management-software

WORKED EXAMPLE

zeba

Site visit report card

One visit, one card. Fill it in before you leave the site.

Card no. 0142

Date 19 Nov 2026

1 WHO, WHERE AND WHEN

VISITED BY: Rakesh Kumar

CUSTOMER OR SITE: Kapoor Hardware

PERSON MET (NAME AND ROLE): Anil Kapoor, owner

AREA OR ADDRESS: Sector 12, Karnal

TIME IN: 11:20 AM

TIME OUT: 12:05 PM

TIME SPENT: 45 min

2 PROOF FROM THE SITE

1 — Arrival: signboard or entrance, with the name visible

2 — The work, the stock or the product you went for

3 — Customer's stamp, signature or a handover photo

Location marked from the site? ☑ Yes ☐ No, I was about _____ m away

3 WHY I WENT

☐ Introduction ☐ Demo ☑ Follow-up ☐ Collection ☐ Complaint ☐ Delivery ☐ Survey ☐ Other _____

4 WHAT HAPPENED

THEY ASKED FOR
Credit of 30 days on the next order. Samples of the 12 mm range.

THEY PUSHED BACK ON
Price is 4% above the Panipat dealer.

WHAT I FOUND OUT
Panipat dealer stocks 3 days late. He is opening a second counter in Jan.

5 HOW STRONG WAS THIS VISIT (TICK WHAT IS TRUE)

☑ Met the person who decides
☐ Budget or timeline was named
☑ Next step agreed, with a date
☑ Need confirmed in their own words
☐ A competitor came up

Count the ticks: 3 of 5

0 to 1
Courtesy call. Do not count it as progress.

2 to 3
Moving. Decide who owes the next step.

4 to 5
Ready to close. Tell your manager today.

6 PROMISES LEDGER: WHO OWES WHAT

WHO	PROMISE	BY WHEN	DONE
☐ We	Send 12 mm samples and the revised rate card	21 Nov	☐
☐ We	Ask manager about 30 day credit	22 Nov	☐
☐ They	Confirm the order quantity for December	26 Nov	☐
☐ We ☐ They			☐

7 NEXT VISIT

DATE: 26 Nov

THE ONE GOAL: Close December order

BRING: Rate card, samples

Visitor signature

Customer signature or stamp

Manager reviewed ☐ Date _____

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