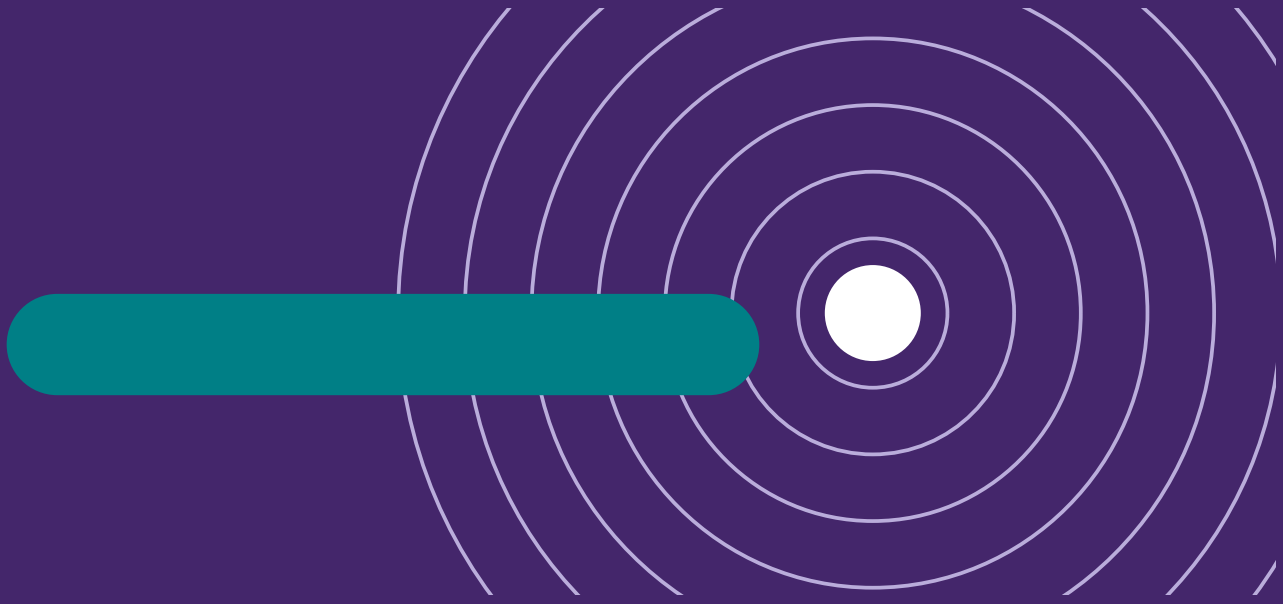
THE PURPLE TEAM

BOOK 01

SALES & CUSTOMER RELATIONSHIPS

SELL WITH PURPOSE

A practical guide to earning trust, qualifying opportunities, and serving industrial customers.



DAVID CHAO

President & CEO, COI Rubber

FIRST EDITION / OCTOBER 2026

START HERE

A useful conversation can change a business.

This book is for the person who wants to become useful to a customer before becoming impressive to a room. It is written from David Chao's perspective as the leader of COI Rubber and the Purple Team.

You do not need to know every rubber compound or manufacturing process before you begin learning sales. You do need to listen carefully, distinguish facts from assumptions, and bring the right people into the conversation. This guide teaches those habits.

What you will learn

Identify a plausible customer. Start a respectful conversation. Understand the requirement. Prepare an RFQ that the technical team can evaluate. Follow up with purpose. Help an accepted order become a dependable relationship.

How to use this book

Read one chapter, practice one behavior, and record what happened. The worksheets at the back are working tools. A manager or mentor can review them with you. They are not applications, contracts, or promises of account acceptance.

Publication note

First edition | October 2026. David Chao / The Purple Team. All customer scenarios, names, and financial examples in this series are fictional teaching examples unless expressly identified otherwise.

COI's current written policies, accepted quotations, and agreements govern actual business. This book does not authorize pricing, technical commitments, customer ownership, or compensation. Participation and earnings are not guaranteed.

Personal and classroom use: you may print the worksheets for your own learning. Keep customer drawings, contact details, and commercial information in approved company systems.

YOUR ROUTE THROUGH THIS BOOK

Sales is a sequence of earned next steps.

04 A letter from David

05 **01 / Become useful before you become persuasive**

07 **02 / Choose accounts you can actually help**

09 **03 / Open a conversation worth continuing**

11 **04 / Turn a need into a useful RFQ**

13 **05 / Follow the quote with judgment**

15 **06 / Earn the next order**

17 **Practice case / The missing specification**

19 **Worksheet / Account focus**

20 **Worksheet / Discovery notes**

21 **Worksheet / RFQ handoff**

22 **Worksheet / Weekly pipeline review**

23 Your first 30 days

Read. Practice. Review. The worksheets are designed to be printed and used more than once.

A LETTER FROM DAVID

Start with the customer's work.

I began my career in industrial rubber sales. That is the foundation of how I think about business: a person has a requirement, a company has capabilities, and somebody must do the careful work of bringing the two together.

It is easy to look at the finished result and see only the order. The work behind it is less visible. Someone found the right buyer. Someone asked what the part needed to do. Someone followed up on a drawing, clarified a delivery requirement, or brought an unresolved question back to the team. Those details are part of selling.

As I became CEO and later acquired full ownership of COI, the responsibility widened. A sale had to make sense for the customer, for the people doing the work, and for the company that would stand behind it. That is the standard I want to pass on.

I want the Purple Team to develop people who can create that kind of value. Enthusiasm helps you begin. Knowledge, honesty, and follow-through give someone a reason to trust you again. You build those qualities through practice.

You will hear no more often than you would prefer. Some accounts will be a poor fit. Some opportunities will take longer than you expect. Use each conversation to become more accurate. Learn what you missed, improve the next question, and keep your records clear enough that another person can help.

I also want you to remember why you are building. A business should support a life you value. The habits in this book are meant to make your work more dependable, so that success does not require confusion and urgency every day.

Begin with one customer you might genuinely help. Understand their work. Earn one useful next step. Then do what you said you would do.

> *My standard for a good sales conversation is simple: both sides should leave knowing something useful and understanding the next step.*

01 / THE SELLER'S RESPONSIBILITY

Become useful before you become persuasive.

When I think about a good salesperson, I think about someone a customer can rely on to make a situation clearer. That may include explaining a capability. It may also include admitting that we need a drawing, a test requirement, or an engineer's opinion before we can answer.

Industrial customers are responsible for outcomes beyond the purchase price. A component has to fit an application. Their organization may need qualification documents, an approval process, predictable communication, and a dependable delivery plan. A seller who ignores those responsibilities has not understood the purchase.

Listen for the job behind the part

A buyer may ask for a rubber component, but the underlying need may be a replacement source, a new product launch, a repeated quality concern, or a cost review. Each reason changes the questions you should ask. A new design needs different attention from an established part with an approved specification.

Avoid filling gaps with confidence. If the customer asks whether a material will survive a particular environment, record the environment and the required performance. Bring the question to the authorized technical team. Your value is in obtaining the answer and communicating it accurately.

Make a small promise you can keep

The first commitment might be to send a relevant capability page or to arrange a review of the customer's requirements. State an achievable next action. If another team's work determines the timing, confirm with that team before promising a date.

Reliability becomes visible through these small commitments. You do not control the customer's decision. You do control whether your notes are accurate, whether your handoff is complete, and whether the customer hears from you when you said they would.

Practice this today

After your next conversation, write one sentence describing the customer's problem without mentioning your product. If you cannot do that, ask a better question before you prepare a pitch.

> *Useful selling reduces uncertainty. Every unsupported promise adds it back.*

01 / PUT IT TO WORK

Map the people behind the purchase.

A buyer's interest is only one part of an industrial decision. Purchasing may coordinate pricing, engineering may define the requirement, quality may approve the evidence, and operations may need the part by a particular date. The actual roles vary by account; ask rather than assume.

Four questions that reveal the process

1. Who defines the technical requirement and drawing revision?
2. Who evaluates a new supplier or a sample submission?
3. Who approves the commercial terms and places the order?
4. Who uses the part and feels the consequences if it arrives late or fails?

You do not need to contact everybody immediately. You need to understand who must be involved before the account can move forward. Respect your contact's process and ask how they prefer to coordinate introductions.

A practical conversation

Suggested language: "To make our response useful, can you walk me through how your team evaluates a new source? I want to understand who reviews the part, what documents you need, and what happens after a quote."

If your contact says, "I just collect pricing," do not treat that person as unimportant. Ask what information would help them make an accurate comparison and who can clarify technical questions. A helpful relationship with a coordinator can prevent many mistakes.

Write a decision map

Record each role, what that role needs, and the next question still unanswered. Use the customer's own explanation. Mark an unknown as unknown. A guessed approver in your notes can become a false assumption for the whole team.

The map also protects you from confusing a friendly response with a committed project. Someone can like your presentation while having no active requirement, no approval authority, and no timeline. Keep the relationship, but describe the opportunity honestly.

Review with a mentor

Take one account and explain its decision process in two minutes. Your mentor should be able to point to the next person or piece of information needed without reconstructing the conversation from memory.

> *A clear buying process is more valuable than a long list of contacts with unclear roles.*

02 / ACCOUNT SELECTION

Choose accounts you can actually help.

I want ambition in the Purple Team, and I want that ambition directed toward work we can serve. A large company name is interesting. A specific application, an accessible buyer, and a credible next step are more useful.

Start with a narrow account hypothesis. For example: "This manufacturer appears to use molded seals in a product family, and its purchasing team may evaluate alternate sources." That is a research starting point, not a claim that the company buys from us or needs our help.

Look for a reason to investigate

An equipment maker's product information may reveal rubber or plastic components. A new product introduction may create sourcing activity. A contact may describe a supply issue or a design change. Verify what you find through a conversation; public information rarely supplies the full purchasing requirement.

COI's public product range includes molded, extruded, and bonded rubber and plastic components. Use current approved company information to decide whether an application deserves review. Do not assume every product in a broad industry fits our capabilities.

Four useful tests

Fit: does the requirement plausibly match what the company can evaluate and supply?
Access: can you reach someone relevant to the purchasing or technical process?
Need: is there an actual project, sourcing concern, or future review worth discussing?
Evidence: can you obtain the documents and facts needed to evaluate it?

You can learn that an account is worth nurturing without calling it a qualified opportunity. Keep those categories separate. A contact for next year's sourcing review is different from a buyer preparing an RFQ this month.

Protect your attention

Choose a small set of accounts to research properly. Record why each belongs on the list. After outreach, update your reason with evidence. Remove accounts that are clearly unsuitable, and reserve a future follow-up date only when there is a reasonable purpose.

> *Your target list is a set of hypotheses to test. It is not a forecast of customers you will win.*

02 / PUT IT TO WORK

Qualify without turning people into scores.

A simple screening worksheet can help you notice missing facts. It should never pretend to predict a sale. The following categories are learning aids, not official Purple Team points or promotion rules.

Question	Evidence worth recording
What is the application?	Product, part function, and operating context
Why consider a new source?	Customer's stated reason, not your guess
Is the requirement defined?	Drawing, specification, sample, or open design question
What volume is involved?	Estimated annual use and expected release quantities
What must happen next?	Review, document request, sample evaluation, or decision

Three outcomes are all legitimate

Advance when there is enough relevant information for the next review. Nurture when there is a plausible fit and a future event to revisit. Close when the opportunity is unsuitable, the customer declines, or the facts no longer support further work.

Closing an unsuitable opportunity is not a personal failure. It frees time for a customer you may be able to serve. Write the reason so that the same account is not repeatedly approached with the same unsuitable offer.

Avoid the large-number trap

A customer may mention a high annual volume. Ask whether that number describes the entire product category, the specific part, or the amount available to a new supplier. Ask about qualification and releases. Never multiply an unverified volume by a guessed price and present the result as expected revenue.

A useful handoff sentence

Suggested format: "The buyer is reviewing an alternate source for [application]. We have [documents]. The unresolved issues are [questions]. Their next review is [confirmed timing], and our next action is [owner/action/date]."

That sentence is more valuable than "Great account, huge potential." It gives the next person a place to begin and shows which facts are still missing.

> *The discipline is not finding reasons to say yes. It is finding enough evidence to make a responsible decision.*

03 / FIRST CONVERSATIONS

Open a conversation worth continuing.

The opening of a call should help someone understand why you are calling and decide whether the conversation is relevant. I would rather earn a short, honest exchange than force a long presentation on someone who has no use for it.

Prepare three things: a reason this account may fit, one relevant question, and a modest next step. You do not need a speech about every capability. You need a conversation that can reveal whether there is a useful connection.

Be direct and specific

Suggested opening: "Hi, this is [name] with COI Rubber. We work with custom rubber and plastic components. I am trying to reach the person who reviews sourcing for [relevant application]. Is that part of your role?"

If it is, ask permission to continue briefly. If it is not, ask which role handles the requirement. Accept a refusal without argument. Your conduct affects the company's reputation even when there is no opportunity.

Discover before presenting

Ask what parts they purchase or develop, what matters when they evaluate a supplier, and whether there is a current requirement. Follow the answer. If delivery planning is their concern, a speech about unrelated product categories will not help.

When a capability discussion is useful, invite them to view the current company website with you. Choose the product, engineering, or quality page related to their question. Use approved current information and ask which part is most relevant to their work.

End with a clear agreement

The next step might be a drawing, a technical question, a scheduled review, or permission to check back at a later time. State what each side will do. A clear "not now" is more useful than a vague "send something" that neither person understands.

Record the result immediately. Memory can preserve the feeling of a good call while losing the requirement that made it valuable.

> *A good opening earns permission to learn. The rest of the conversation must earn permission to continue.*

03 / PUT IT TO WORK

A conversation you can practice.

This fictional exchange is a rehearsal aid. Adapt the language to your own voice and the customer's actual answers.

Opening

Representative: "We work with custom rubber and plastic components. Do you handle sourcing for the seals used in your equipment?"
Buyer: "Yes, but we already have suppliers."
Representative: "Understood. When you evaluate an alternate source, what usually prompts that review?"

Discovery

Buyer: "Mostly new projects or delivery issues."
Representative: "Is either one active now, or would it be better to reconnect around your next sourcing review?"
Buyer: "There is a new project, but the design is still changing."
Representative: "Then the first step may be understanding the application and the latest requirements. Who is coordinating the design review?"

Relevant presentation

Representative: "If useful, we can look at the relevant capability page on coirubber.com together. Then I can bring your open questions to our team."
Buyer: "Send the link. I have five minutes tomorrow."
Representative: "I will send the relevant page and a short agenda. What time works for that review?"

Keep consent separate from the opportunity

If you offer the website newsletter signup, explain that it is optional and requires the customer's confirmation. Do not enter their address for them. Declining marketing emails must not affect access to a presentation or an RFQ review. Follow current company instructions for contact records and stop requests.

Debrief the practice

What made the account relevant? Which fact changed the next step? What remains unknown? What action did each person actually agree to? Have a partner play the buyer and change one answer each time.

Do not memorize the buyer's responses. Practice noticing them. The skill is adjusting your question when the situation changes.

> *The script begins the conversation. Listening determines where it goes.*

04 / THE RFQ

Turn a need into a useful request.

An RFQ is a request for quotation. It is the bridge between a sales conversation and a commercial evaluation. A useful RFQ helps the team understand what the customer is asking us to make, what evidence supports the requirement, and what remains unresolved.

The salesperson is responsible for gathering information accurately, not inventing the engineering answer. A missing material specification is a question. A drawing with an unclear revision is a question. An estimated annual volume without release quantities is incomplete planning information.

Get the foundation right

Capture the company, relevant contact, application, part number, and current drawing revision. Ask for material and performance specifications if available. Record annual volume estimates, order quantities, required timing, and any sample or qualification process.

Some customers begin with a sample or an incomplete design. Describe that starting point honestly. Ask whether they are seeking design input, reverse-engineering review, a production quote, or an early feasibility discussion. These are different requests.

Keep the original evidence

Use the approved system to transfer documents. Preserve the customer's files and revision labels. Do not quietly redraw a dimension, convert a tentative number into a requirement, or forward an uncontrolled copy after a revision changes. Obtain permission and follow the company's process for confidential information.

Separate facts from assumptions

Your cover note should have three parts: confirmed requirements, missing information, and the requested next decision. This lets the technical and commercial teams assess the opportunity without treating your interpretation as a customer specification.

Before handing off, read the package as if you had never heard the call. Can you identify the part, the requirement, the decision requested, and the owner of the open questions? If not, improve the handoff.

> *A complete-looking RFQ with guessed facts is less useful than an honest RFQ that clearly identifies what is missing.*

04 / PUT IT TO WORK

Write the handoff another person needs.

The example below is fictional. It illustrates a clear handoff, not an accepted COI project or a recommended material choice.

Example: equipment enclosure seal

Application: a seal for an equipment enclosure. Customer provided a drawing marked revision C. The drawing identifies dimensions but refers to a separate material specification that has not been supplied.

Volume: the buyer estimates 24,000 units annually and asks about releases of 2,000. These are planning estimates, not purchase commitments. Desired production timing is stated by the buyer; COI has not confirmed feasibility or delivery.

Qualification: the customer's engineer will review a proposed sample plan. Approval criteria and required documentation are still unknown. Purchasing wants an initial commercial review after the missing specification is available.

The representative's cover note

"Please review whether this application fits our capabilities. Attached is the customer drawing, revision C. Material specification and sample acceptance criteria are pending. I have asked the buyer to provide both. Please identify any additional information needed before a quotation can be prepared."

What to ask next

Ask for the referenced material specification, operating conditions relevant to evaluation, and the person responsible for sample acceptance. Confirm whether the customer expects tooling, samples, production, packaging, and freight to be quoted separately. Let the authorized team determine the technical review required.

What not to do

Do not select a compound from a general comparison chart and promise equivalence. Do not treat estimated annual usage as an order. Do not promise a sample date before the team confirms the scope and schedule.

A strong handoff can still be incomplete. Its strength comes from making the gaps explicit and assigning a path to resolve them. Use the RFQ worksheet on page 21 to keep that discipline consistent.

> *Precision in the handoff saves everyone from having to rediscover the same missing fact.*

05 / QUOTATION FOLLOW-UP

Follow the quote with judgment.

Sending a quote is not the end of the sales process. The customer still has to understand the offer, compare it with their requirement, and decide what happens next. Your job is to help that evaluation proceed accurately.

Begin by confirming receipt of the authorized quotation and checking that the customer is reviewing the correct revision. Ask which elements need clarification: quantity, tooling, samples, lead time, packaging, shipping basis, payment terms, or qualification. Refer questions back to the responsible team.

Compare the whole requirement

A quoted unit price is meaningful only in context. Different quantities, materials, inspection requirements, or freight assumptions can create differences that a price-only comparison hides. Ask what the customer is comparing before asking the team for a change.

An objection is information. "Too expensive" could mean the total exceeds a budget, another quote includes a different scope, or the buyer does not yet see the value. Avoid assuming the answer is a discount. Clarify the concern and bring evidence to the commercial team.

Use an agreed follow-up

Ask when the customer plans to review the quote and what they expect to decide. Schedule your follow-up around that event. If there is no date, propose a reasonable check-in and accept a different preference. A message should contribute a question, clarification, or useful update.

Respect the authority to commit

The representative does not independently change price, delivery, warranty, technical requirements, or payment terms. Record the customer's request, get an authorized response, and make sure any accepted change appears in the appropriate written document.

If the account stalls, identify the unanswered decision. You may discover a design hold, a budget issue, or a project that has stopped. Update the pipeline rather than leaving an old quote disguised as an active opportunity.

> *Follow-up works best when it helps a decision move forward. Repetition without a purpose is only noise.*

05 / PUT IT TO WORK

Respond to the concern behind the objection.

Use these as practice prompts. The aim is to understand the issue, not to win an argument.

"Your price is higher."

Suggested response: "Can we compare the same drawing revision, material requirement, quantity, and shipping basis? If those match, what price or cost issue should I bring back to our team?"
Next action: record the comparison and request an authorized review. Do not claim the other supplier's product is inferior without evidence.

"We need it sooner."

Suggested response: "What date is driving the requirement, and is that for samples or production? I will check feasibility with the team before confirming anything."
Next action: distinguish desired timing from confirmed delivery. Ask whether a staged plan would be useful for review, without promising that one is available.

"We are happy with our supplier."

Suggested response: "That makes sense. Do you ever qualify an alternate source, or would it be better to reconnect when a new project comes up?"
Next action: honor the answer. A future relationship does not require undermining the current supplier.

"Just send your best price."

Suggested response: "I want the price to reflect what you actually need. Which specification and quantity should our team use, and what else must the quote include?"
Next action: close information gaps before requesting a revision.

A follow-up message with a purpose

"Following up on quotation [reference]. You mentioned an engineering review this week. Were any questions raised about the drawing, sample process, or commercial terms? If the schedule changed, let me know the best time to reconnect."

The record after the conversation

Write the customer's concern, your next action, the authorized owner, and the next review date. If the customer declines, ask whether they are willing to share a reason. Record what they actually say without turning it into a story about your own performance.

> *The most useful response is often a better question followed by a reliable answer.*

06 / ACCOUNT SERVICE

Earn the next order.

The first order begins a new responsibility. The relationship now depends on how the team handles the details the customer approved. A seller who disappears at this point makes the next sale harder for everyone.

Confirm that the purchase order is reviewed through the authorized process. Differences between the order and the quotation need attention: part revision, quantity, price, delivery, terms, or added requirements. Do not treat a customer's order as automatically accepted or quietly overlook a mismatch.

Maintain one clear version of the work

If a drawing changes, route it to the responsible team. Ask what the revision affects and how it will be acknowledged. Keep the customer informed through the approved communication path. A helpful update should distinguish what is confirmed from what is still being checked.

Stay close to the customer's next decision

Samples may need evaluation. Production may depend on approval. A first shipment may lead to a review of fit, documentation, packaging, or receiving. Ask how the customer will confirm that the agreed requirement has been met.

Repeat business develops through continued usefulness. Ask about the customer's planning process and the timing of future reviews. Learn whether demand has changed. Bring new requirements back for evaluation rather than assuming a prior approval applies to a different part or revision.

Handle a concern without defensiveness

If the customer reports a problem, acknowledge it, gather the facts, and involve the responsible team promptly. Ask for the part and order references, affected quantities, evidence, and operational impact. Follow the company's quality and containment process; do not improvise a technical disposition.

The customer deserves accurate information even when the answer is still being developed. Agree on the next update and follow through. Ownership of the communication is a service you can provide without pretending to own every technical answer.

> *The second order is earned through the experience surrounding the first one.*

06 / PUT IT TO WORK

Use a rhythm the customer can trust.

Account service becomes easier when its basic questions are repeated at the right moments. Use this rhythm as a training aid and adapt it to the account and current company procedures.

Moment	Question to resolve
Before acceptance	Do the order and authorized quote agree?
Before a sample review	Who evaluates it, against which requirements?
After a change	Which revision is now approved, and by whom?
At a concern	What happened, what is affected, who owns the response?
Before the next release	Have demand, requirements, or timing changed?

A useful update

"We have received your report concerning [reference]. Our team is reviewing [specific issue]. Please send [needed evidence] through the approved channel. I will provide the next status update by [confirmed time], even if the investigation is still in progress."

Only commit to an update time you can honor. A status update can explain that a review is ongoing. It should not fill the gap with a guessed cause or an unapproved remedy.

Keep the relationship broader than the problem

When an issue is resolved, record what was decided and what should change. Ask whether the response addressed the customer's concern. Feed the lesson back into the account plan so it improves the next order rather than disappearing into an email thread.

Review your own contribution

At the end of the week, ask: Which commitment did I keep? Which open question needs an owner? Which customer is waiting without a clear update? Which opportunity should be closed or paused? These questions keep service from depending entirely on memory.

Growth should make the business more dependable. If every added account creates another private collection of promises that nobody else can see, improve the records and handoffs before adding more complexity.

> *A dependable account has a visible next action, a responsible owner, and an honest status.*

PRACTICE CASE / PART 1

The missing specification.

Fictional training case. This is not a COI customer, quotation, or performance claim.

Maya, a new representative, reaches a purchasing coordinator at an equipment manufacturer. The company is considering another source for an enclosure seal. The coordinator emails a drawing and says, "If your price is good, there could be a lot of business here."

Maya feels the opportunity is important. She wants to request a rush quote immediately. Before doing so, she reads the drawing and notices a reference to a material specification that is not attached. The annual quantity is described only as "around 24,000," and there is no planned release schedule.

Pause at the right moment

The opportunity may be worth pursuing, but the package does not yet support a complete evaluation. Maya writes down the confirmed facts: a relevant contact, an application, a drawing revision, and an estimated volume. She separately lists the missing specification, release quantities, qualification process, and timing.

She asks the coordinator for the missing material document and the engineer responsible for evaluating a new source. She also asks whether the annual figure applies to this part or to a larger group of parts. The coordinator explains that the quantity is for one part, but production timing depends on a design review next month.

The better handoff

Maya sends a feasibility request with the available documents and a clear list of unresolved questions. She does not describe the opportunity as a booked order, promise a sample date, or select a substitute material herself.

The technical team identifies another clarification needed from the customer. Maya gathers it and updates the same record. The next step is a review of the completed information, not a celebration of revenue that does not exist.

Discuss

What did Maya do that protected the customer? What did she do that saved the team's time? Which detail changed the opportunity's timing? What would have happened if her enthusiasm had become an unsupported commitment?

> *Good judgment does not kill momentum. It gives momentum a direction supported by facts.*

PRACTICE CASE / PART 2

Move forward without inventing certainty.

Continue the fictional case. The customer supplies the missing information and COI's authorized team prepares a quotation. The coordinator responds, "The unit price is higher than our existing source. Can you do better?"

Maya asks what scope is included in the comparison. She discovers that one figure is based on a different release quantity and that tooling is being discussed separately. She records the differences and requests a commercial review. She does not promise that the price will change.

Separate the decisions

The customer must decide whether the proposal merits technical evaluation. The technical team must confirm the requirements and sample approach. The commercial team must approve any revised terms. Maya coordinates information between those decisions.

Observation	Responsible next step
Price comparison differs	Clarify quantities and scope
Sample criteria are incomplete	Ask the authorized customer reviewer
Requested timing is aggressive	Get a feasibility response before committing
Buyer wants a discount	Route the request with evidence
Project pauses	Record the reason and a useful review trigger

A responsible outcome

The customer agrees to discuss the quotation after its design review. That is progress, even though there is no order. Maya records the next meeting, the questions to resolve, and the person responsible for each one. She updates the pipeline stage to match the evidence.

The case could still end with a lost opportunity. A professional process cannot guarantee a win. It can reduce preventable confusion and help everyone decide whether the business makes sense.

Your two-minute debrief

Explain this account to a colleague without using "huge," "definitely," or "basically sold." State the application, evidence, open questions, stage, and next action. If the colleague can take over that next action, your record is useful.

> *The measure of progress is the decision you have earned, not the confidence of your forecast.*

WORKSHEET 1

Account focus

Use one sheet per account. Record verified facts separately from research assumptions. Keep completed sheets in an approved system; do not distribute customer information publicly.

Company and relevant product or application

Why this account may fit COI's capabilities

Evidence already verified / source and date

Buyer, technical reviewer, and other relevant roles

Current need or future trigger to investigate

Missing information / owner of each question

Next action, responsible person, and date

Decision: advance, nurture, or close / reason

WORKSHEET 2

Discovery notes

Complete immediately after the conversation. Write the customer's stated requirements and concerns, not a reconstruction of what you hoped they meant.

Contact, role, date, and account record reference

What problem or project did the customer describe?

What matters in the supplier evaluation?

Which documents or requirements are available?

Who reviews technical and commercial decisions?

What did each side agree to do next?

Timing confirmed / timing still uncertain

Follow-up preference and any stop request to route

WORKSHEET 3

RFQ handoff

This is a collection checklist. The authorized team decides whether the package is sufficient for feasibility review or quotation. Unknown items stay marked unknown.

- ☐ Company, contact, application, and internal record reference
- ☐ Part number and current drawing revision
- ☐ Customer-provided material and performance specifications
- ☐ Annual estimate distinguished from committed orders
- ☐ Expected release quantities and requested timing
- ☐ Sample, inspection, documentation, and approval requirements
- ☐ Packaging and commercial questions requiring review
- ☐ Original documents stored through the approved process

Confirmed facts / attachments and revision labels

Missing information / person responsible for obtaining it

Decision requested from COI / next review date

WORKSHEET 4

Weekly pipeline review

Use the evidence column to explain why each opportunity is at its current stage. Do not record customer-sensitive details in copies used for classroom practice.

Account or record	Current stage	Evidence	Next action / owner / date

Which opportunity should advance, pause, or close, and why?

What commitment needs attention before the week ends?

Which skill will I practice next week?

YOUR FIRST 30 DAYS

Build habits before you chase volume.

This learning plan is a suggested practice sequence, not a promise of results or an official activity quota. Adapt it with your manager to the work you are authorized to do.

Days 1-7: understand and observe

Review current company capabilities. Learn where approved information lives and who handles technical, commercial, and account questions. Observe a customer conversation if permitted. Practice explaining one application in plain language. Complete an account-focus worksheet using verified public information.

Days 8-14: practice discovery

Rehearse the opening and role map with a mentor. Make authorized outreach to suitable accounts. Focus on obtaining an accurate description of the need. Debrief the conversation and record a real next step, including a pause or a respectful close when appropriate.

Days 15-21: improve the handoff

Use the RFQ checklist on a real authorized opportunity or a fictional training case. Ask the receiving team what is missing. Revise your notes until another person can understand the requirement without replaying the call.

Days 22-30: review the whole cycle

Examine follow-up, record quality, and kept commitments. Identify one skill to continue practicing. Discuss opportunity quality with a manager before increasing volume. The objective is a process that gets more accurate as you repeat it.

Continue the series

Read **Build a Business That Works** for operating habits and leadership. Read **Build a Life You Believe In** for personal discipline and perspective.

Editorial basis

Company practices were adapted from COI's Sales Call Guide and Purple Team Master Playbook, revision C, October 22, 2026. Product-category context: coirubber.com, reviewed October 22, 2026. Current written company instructions supersede examples in this book.

THE PURPLE TEAM

EARN TRUST. MAKE THE NEXT STEP CLEAR.

Sales begins when you become useful to another person's work. Learn the requirement, involve the right people, and keep the commitment you make next.

THE THREE-BOOK COLLECTION

01 Sell With Purpose

02 Build a Business That Works

03 Build a Life You Believe In

DAVID CHAO

COI Rubber | coirubber.com

The Purple Team / Book 01 | First edition, October 2026