

TOOLING RELOCATION CHECKLIST

TITLE

DATE

TIMING

Establish and communicate dates

- We have enough inventory to last at least one month
- Drop-dead date for conducting our sourcing research has been established
- Planned sourcing process duration has been communicated to potential suppliers
- Quote due date is in the Request for Quote (RFQ)
- Anticipated site inspection date(s) included in RFQ
- Expected decision/award date included in RFQ
- Desired date for receipt of first article samples is included in RFQ
- Requested production start date is included in RFQ

RESEARCH

Find potential candidates

- Have you found suitable suppliers with the applicable industry experience?
- Do the suppliers have the required certifications and/or registrations (if any)?
- Do the suppliers have the adequate resources?
- Do the suppliers have the necessary capabilities?
- Do the suppliers have enough capacity to accommodate your program?

RFQ

Provide data and request quotes

- Are you sending out Requests for Information (RFI) before Requests for Quote (RFQs)?
- Your personal and company contact information is included in the RFQ
- A request for supplier data and documentation is included in the RFQ
- Summaries of the program, the assembly, and the part usage are included in the RFQ
- All necessary information, documentation and materials have been provided
- Mold dimensions (LWH) are included in the RFQ
- Number of cavities in each mold is included in the RFQ
- Information regarding any secondary operations has been provided
- Any packaging guidelines have been given

DATA & MATERIALS

Compile information and documents

- 3D solid model CAD files for each part have been given to potential suppliers
- Drawings (prints) for each part have been given to potential suppliers
- Material requirements have been provided
- Governing regulations have been provided
- Samples of each part have been supplied
- Tooling data, documentation and photographs have been provided (if available)
- Production and processing data and documentation have been provided (if available)

EVALUATION

Analyze quotes and interview suppliers

- Company standards for evaluation and contract award have been established
- Efforts have been made to calibrate the quotes received, including requests for revisions
- Proposals have been thoroughly reviewed and analyzed
- Quotes received have been compared and contrasted with each other
- Potential vendors have been met and interviewed
- A preferred supplier has been identified
- The chosen supplier has been awarded the contract

MOVE

Transfer tooling

- The timing and logistics of the move has been discussed with the new supplier
- Prior molder has been notified of the intent to move
- An offer has been made to purchase material the prior molder has, if applicable
- If the new supplier is picking up the molds, written approval for that has been given
- Request for dimensions and availability of shipment has been given to the prior molder
- Shipment dimensions and date available have been given to party handling shipping
- Request for all associated documents and materials has been given to the prior molder
- Request for processing and tooling data has been given to the prior molder
- All debts to prior molder have been paid, if necessary
- There are no outstanding orders for the prior molder to fill

NOTES

Plan ahead and stay organized