

Sourcing Checklist

This checklist is for guidance only, every situation is different and may require additional or different inputs, checkpoints or process steps. If in doubt, seek advice, and adapt accordingly.

Commercial Inputs:

- Annual volumes (to gauge business size and suitable suppliers)
- Current price (for comparison during analysis)
- Current supplier (to avoid that current supplier is contacted)
- Target price (if available)
- Target supplier location/s
- Relevant sourcing strategies and/or procurement targets
- Notification of any disqualified suppliers
- Confidentiality Agreement / Non-disclosure agreement (NDA) Template

Technical Inputs:

- List of parts to be included in RFQ (request for quotation)
- Drawings
- Material requirements or required material properties (helpful if suppliers are proposing alternative materials)
- Written specifications (if applicable)
- 3D Models for complex parts (if required)
- Inspection & Test Plans if applicable
- Any standards or norms to be applied

Supplier Identification and Comparison:

- Identification of potential suppliers based on manufacturing/service capability, quality standards (e.g. ISO 9001), location, capacity/fit to volume, financial health and customer service.
- If NDA is required and signed and supplier confirms interest to supply, send request for quotation (RFQ) including specifications and conditions on which parts should be quoted (e.g. delivery terms, part and tooling pricing and lead-times etc.).
- Technical and commercial clarifications with the supplier (may require further technical inputs) to enable the supplier to make an accurate offer.
- Assessment of any material substitutions proposed by shortlisted suppliers with competitive offers.
- Analysis and comparison of total cost (ideally including visual charts).

Next steps upon supplier selection or supplier shortlisting (not necessarily in this order):

- Further clarifications with supplier (by phone, face to face and/or visit to supplier premises).
- Audit of supplier / Supplier Qualification
- Request / order samples / Testing and Product Qualification
- Negotiation and agreement of pricing or frame agreement and terms & conditions of supply