



## Initial Project Investigation Form

**Scope/Purpose:**

Checklist for use at Initial Project investigation, to ensure all customer requirements are identified before PDD Review.

Form to be completed by the Sales Team and Customer for completion prior to filling out a PDD, to identify the requirements and highlight the relevant checks required.

**Section 1. Sales Department Entries. Initial Completion by Sales Department and by customer (if required)**

Customer:		NDA in Place? (always ask this question and if not get one in place) <b>QMF 73</b>	
Customer SAP Code: If not set up <b>QMF 52 + QMF 61A</b>		BDM/Account Manager:	
Brief description of the Project:		Date:	
Customer Market (Helps determine product selection)		Engineer Contact: (Tel;Email;Job Title)	
Is a technical specification available? If yes, please share.		YES <input type="checkbox"/> NO <input type="checkbox"/>	
Estimated Yearly Volumes:			
Target Price?			
Do they have a current design and any issues with the assembly? ((If possible, get the customer to share, great way of seeing the schematic and offering alternative solutions to improve design)):			
Is a sample available?			
Are they assembling this internally? If not do they have an existing contract in place with another supplier (when will this end)?			
Please state desired sample deadline. Can we offer pre-customer acceptance samples for initial ideas? A great way for the customer to visualise before going any further.			

<b>Customer Acceptance Discussion and our Process (Sales Drawing to sign off in the first instance; initial prototype batch (to be paid) to be signed off – prior to FAI (First Article Inspection))</b>			
Delivery address and for the attention of for initial customer acceptance prototypes?			
Customer Acceptance Quantities required? (Small prototype run for initial design concept based on Sales Drawing sign off)			
Customer happy to help with initial Engineering (Prototypes) Fee? Initial Customer Acceptance Prototypes?			
Information required before we send customer acceptance drawing:			
Will this need to assembled in a Clean Room? (Class 7 or <b>Class 9 preferred</b> )			
Please state material compliance required (e.g ISO 10993; USP Class VI; Californian Prop 65; RoHS)?			
Will the product be sterilised? (we cannot offer this at TWG – however great to know for product selection) (Gamma, ET0, AutoClave as examples)			
Packaging requirements? (Double Bag?) Will this be for internal use or straight to commercial use? This could mean a different way we label. Labelling can be quite important so ask if they have a label layout they like currently. Size of label as well. (As standard we label on the bags (bulk or individual) and on the outside of the box too).  Always ask what information they would require on the label (TWG Standard is the following):  Part Number (BP number) Production Order Quantity Date Description  We can add more to them like the following:  Batch ISO Symbols Bar Codes			
Material device classification. Please confirm (Class 1, 2a, 2b or 3) (if Applicable)			
Batch Traceability?			
Tubing Tolerance on cut lengths (allowable +/-mm by the customer)?			
Certificate of Conformance required for each Delivery? (Standard Deliveries have a basic statement) if they require more we would charge per delivery.			
Completed By BDM Team Member:		Position:	
Signature:		Date:	

Completed By Customer:		Position:	
Signature:		Date:	
Section 2. Project acceptance – Manager Approval – <b>Once APPROVED fill in QMF 58 and Follow PWI 04</b>			
Feedback on project:			
Completed By Manager:		Position:	
Signature:		Date:	