

DOCUMENT NUMBER 91-1001	REVISION B	TITLE Repeat and New Business Inquiries	REV DATE 03/2019	Page 1 of 2
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1.0 Purpose of Procedure

This document describes the process that Product Resources uses to determine product requirements for existing product and new products.

2.0 Scope of Process

The scope of this procedure is all processes pertaining to requirements for products and services to be offered to customers.

3.0 Process Owner(s)

3.1 Sales Manager,

3.2 Customer Service

4.0 Procedure

Product Resources receives request for proposals and quotes through a variety of methods; on-line via the website, customer calls, customer visits, referrals etc. The customer request can be written or verbal. Product Resources will deliver a quote, which is always written. All RFPs are recorded as opportunities in the CRM module of the ERP system. The Opportunity number created via the ERP system then references the quote which is maintained in the Sales drive. All quotes are referenced in the ERP system and the quote, quote data and documentation is maintained in the Sales drive.

4.1 Repeat Business (Standard Product)

If the request is for a product that we have previously sold, we are already done with the process of determining product requirements. Repeat products have been built before and are already in the ERP system and the task ahead is that we are going to use the existing information to build more of the product (or provide more of the service). We capture the customer's requirements for item number, quantity, date, and any other requirements communicated by the customer.

4.2 New Business (Custom Product)

If the request is for a new product, we will proceed to determine the product requirements. The scope of the required information is partly dependent on how much information has been provided by the customer. Sometimes the information from the customer fully describes the requirements. At other times little information beyond a general idea is provided by the customer. Product Resources must assess what product requirements need to be determined and must bring together the various groups – Manufacturing, Engineering, Quality, Finance, and executive management – to determine requirements.

Product Resources must learn from the customer in this phase if the product is an explosive atmospheres product or a medical device. When such a product, this requirement should be considered when developing the quote and the Quality Manager should be consulted for input. Also when such a product, Product Resources should request any associated device listing reports from the customers, as such listing reports will (a) state any special requirements for the manufacturer, (b) describe which components are directly controlled by the regulatory body, and (c) describe which documents are directly controlled by the regulatory body.

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A Statement of Work should be started at this point to act as a communications vehicle between Product Resources for the expectations for the product or service that Product Resources is proposing to provide. The Statement of Work is typically part of the Quote.

The above may be an iterative process both internal to and external to Product Resources until the product requirements are understood.

5.0 Control of Records

The storage location and retention period for records referenced above are given in 91-6002, Control of Records.