

RFQ # \_\_\_\_\_ Desc \_\_\_\_\_ Due \_\_\_\_\_  
Sales \_\_\_\_\_ Desk \_\_\_\_\_ Cell \_\_\_\_\_ Email \_\_\_\_\_  
Customer Name \_\_\_\_\_ Industry \_\_\_\_\_  
Address \_\_\_\_\_ Main Phone \_\_\_\_\_  
Purch \_\_\_\_\_ Desk \_\_\_\_\_ Cell \_\_\_\_\_ Email \_\_\_\_\_  
Tech01 \_\_\_\_\_ Desk \_\_\_\_\_ Cell \_\_\_\_\_ Email \_\_\_\_\_  
Tech02 \_\_\_\_\_ Desk \_\_\_\_\_ Cell \_\_\_\_\_ Email \_\_\_\_\_  
Quality \_\_\_\_\_ Desk \_\_\_\_\_ Cell \_\_\_\_\_ Email \_\_\_\_\_

**QUALIFY** (Is it a real project, or are we helping with 'homework')

1. Low to med volume of precision parts or assemblies? Other? \_\_\_\_\_
  2. One-time order or opportunity of repeat? Y N
  3. Is this a new Customer or Division to Monroe ? (First job?) OEM or Tier# \_\_\_\_\_
  4. What Opportunity Stage are we on?
  5. Is Schedule 'reasonable'? (Can the work be done in time or will we need more time than they are requesting)? Is job considered 'rush' Y N
  6. Who is the competition? \_\_\_\_\_
  7. Do we have a reasonable expectation of receiving an order? Y N
- Further on above:

**SCOPE**

1. Details ? Assemblies? Design? Design & Build? CMM?
  2. Precision required beyond 'Boring Mills' and/or 'Bridgeports'? Y N
  3. Are quality registrations a requirement? Y N ISO? AS9100? Other? \_\_\_\_\_
  4. Exotic (Armor, ceramic, composites, etc) or dangerous (Beryllium, Magnesium, etc) materials involved? Exotic Mat'l: \_\_\_\_\_ Potentially Dangerous: \_\_\_\_\_
  5. RFQ: List of details? Scope document? Other: \_\_\_\_\_
  6. Drawing Files: PDF Solidworks AutoCAD Other \_\_\_\_\_
  7. Special Inspection? First Part? AQL? COC? FAI? 100%? PPAP? Material Certs? Other?
- Further on above:

**SCHEDULE**

1. Quote \_\_\_\_\_ PO \_\_\_\_\_ First Part/Assy \_\_\_\_\_ Completion \_\_\_\_\_
  2. Progress reporting required? Y N
- Further on above:

**ACTION**

1. OK to reach-out to Tech Contacts? Y N
  2. QUOTE? \_\_\_\_\_ NO-QUOTE? \_\_\_\_\_ WHY? \_\_\_\_\_
- Further on above:

## RFQ ~ QUALIFY CHECKLIST ~ NOTES

Monroe Sales team should use this tool for three primary purposes:

1. Gather the essential information required for Monroe to prepare a quote.
2. Determine whether the job is a good fit for Monroe Custom Manufacturing
3. Qualify the request to ensure that it is a beneficial use of our limited estimating resources.

### Ideal jobs are:

- Jobs we have experience with, require a high level of precision, and demanding quality requirements. (Barrier to entry for shops that do not have the high quality equipment and systems that we have)
- Small to medium volume parts, with long term (repeat delivery) type contracts we are manufacturing process experts; we can design & build highly efficient work-holding fixtures; design and procure specialty tooling; process & program across CNC machine tools ~ Again creating a barrier to entry for shops without our expertise and equipment; thereby justifying premium prices.
- Mechanical Build of Sub-Assemblies, Fixtures, Robot End of Arm Tooling, Pallets, etc. (Factory Automation) Historically, our (Tier1 or Tier2) Customers are system integrators and handle wire, pipe, integration, etc. Typical customers sell automation systems, cells, equipment to OEM's
- Design & Build of manual and hydraulic work-holding fixtures for Production Machine Shops. Very specialized & challenging work. We are very good at this, and jobs are usually lucrative.
- Design-only jobs; we have outsource capacity, and will take this type work if it leads to part manufacture or assembly jobs.
- CMM services; We can CMM certify (traceable to NIST standards) parts or assemblies; customers are typically located in SE Michigan.

---

***We have limited estimating resources,*** therefore need to work on RFQ's which are a good fit, we can make money on, and will further business relations. We need to avoid budget quotes, or being the 'third quote' because their policy is to have three quotes!

***"Is this a new Customer or Division to Monroe? (First job?)"*** In some cases, a first job for a customer may not be the ideal job for us. However, 'getting in the door' may justify the efforts to quote and deliver a job to establish relationships; understand how they work, and unlock other, more suitable types of work.

***"Boring Mills' and/or 'Bridgeports'"*** (on the Field Data Sheet) refers to jobs that can be done by about any low-cost machine shop; simple and inexpensive machines; these shops may not be ISO registered or have the quality systems or capabilities we have and offer. If a customer will accept work from these shops, we would be too expensive.

***"Are quality registrations a requirement?"*** This qualifying question is similar to the above. If a customer will accept work from a shop without a strong quality system in place, it is likely that we will not be competitive.

---

**Quality requirements;** A good indicator of technical scope; price increases quickly as more quality spec's. are added

- AQL Acceptable Quality Level or Limit; An industry standard with very specific requirements
- COC Certificate of Conformance; we provide a document that confirms we meet customer standards
- FAI First Article Inspection; inspection report submitted and ok'd by customer before we proceed
- 100% Requirement that each and every part be inspected; Parts should be serialized and have a report
- PPAP Production Part Approval Process; very stringent requirement to be met before production starts
- Material Certs very common for A&D work; confirms material chemistry, characteristics and origin.