

COMPANY

CONTACT NAME / EMAIL

DATE

01 Product at a glance

Define the commercial requirement first

PRODUCT / WORKING NAME

CATEGORY / HS CODE IF KNOWN

INTENDED UK USE / CUSTOMER

CURRENT STAGE — IDEA / SAMPLE / EXISTING ORDER

02 Commercial and supply frame

INITIAL ORDER / MOQ TARGET

EXPECTED ANNUAL VOLUME

TARGET PRICE / CURRENCY / INCOTERM

REQUIRED SAMPLE / PRODUCTION / DELIVERY DATE

EXISTING SUPPLIER, QUOTE OR FACTORY?

03 Product requirements

MUST-HAVE SPECIFICATION — FUNCTION, MATERIAL, SIZE,
PERFORMANCE

BRANDING, PACKAGING, LABELLING AND ACCESSORIES

04 Quality, evidence and shipment

KNOWN STANDARDS, TESTS, CERTIFICATIONS OR DOCUMENTS

INSPECTION CRITERIA, DEFECT CONCERNS OR PAST ISSUES

05 Support required

Tick every area that may apply

- ☐ Supplier research
 ☐ Factory verification
 ☐ Quote comparison
 ☐ Samples / development management
 ☐ Quality follow-up
 ☐ Order
- ☐ Canton Fair meetings
 ☐ Existing supplier support
 ☐ Other: _____

06 Decision priorities and context

TOP THREE PRIORITIES — COST / QUALITY / SPEED /
MOQ / CONTROL

BACKGROUND, LINKS, CURRENT QUOTATIONS OR QUESTIONS CARL SHOULD REVIEW

USEFUL ATTACHMENTS

- ☐ Product photos
 ☐ Drawing / specification
 ☐ Current quote
 ☐ Test report
 ☐ Packaging artwork