

			<h2>Quoting</h2>
QMS GI-M1	Rev D	Date 10-04-17	Procedure Authority: Production Manager

Purpose: The purpose of this procedure is to describe our method for coordinating, developing, review and follow-up on quotes.

Scope: This procedure begins with a customer’s request for quote, illustrates a multi-disciplined approach to collecting data, creating the pricing structure, delivering the quote to the customer, as well as obtaining feed back through follow-up customer contact.

Responsibility: The overall quote process is “owned” and managed by the General Manager

Definitions: RFQ = Request for quote
DTQ = Decline to quote

Reference Documents: Quote Log = An electronic (Excel) file to store relevant information.
PFP2 = PMC Quote Sheet
FM91 = Sales Follow-up Guide Sheet

Procedure: *(See attached flow diagram for an illustration of this procedure)*

1. When an RFQ is received, the General Manager shall be notified to facilitate all appropriate actions and proper attention.
2. The General Manager, or designee will enter the RFQ into the Quote Log which initiates a corresponding number for identification purposes and recall. The Quote Log enables us to exchange information, track the status, record follow-up data and provides a historical record. The Quote log shall be updated and maintained by the General Manager or an appointed designee.
3. Each RFQ is then reviewed for feasibility by the General Manager and others as appropriate. Any concerns are reviewed with the customer, and a disposition of feasibility is made. If a decision is made that the work opportunity is not feasible, the RFQ is categorized as "DTQ" and appropriate notification is sent to the customer.
4. Once the work opportunity is deemed feasible, the General Manager and staff will work to obtain a collection of all the associated costs. For example:
 - a. **Molding (production only)** = machine cost, Mold maintenance, set-up, materials, packaging, freight, etc.
 - b. **Molding (production with tooling)** = All of above plus the cost of designing and building a new mold.

Procedure Contd.

5. The General Manager will collect all appropriate data, establish a quote records folder (Electronic or Hardcopy) and enter specific data into a “PMC Quote Sheet” (PFP2), which calculates and displays the final pricing structure.

Note: The “PMC Quote Sheet” is a proprietary electronic file, for internal use only. Its format and content may be different depending on circumstances.

6. The General Manager (and/or designee), will then review the Quote Sheet, as well as other details in the quote folder with others as appropriate. Final adjustments, if any, will be made at this time and a collective agreement on the accuracy of the pricing structure.
7. The General Manager will see that a formal quotation letter is generated including the final piece part price and/or tooling price as appropriate. The letter is then sent to the customer (via fax, mail, e-mail, hand delivered, or customer required format).
8. The final package is bundled and filed for future reference.
9. *(Steps 9 & 10 are discretionary, based on many variables);* In general, the follow-up designee, (usually our salesman), will contact the customer within two weeks of quote submission*. When appropriate, this communication should be consistent with form FM91 “Sales Follow-up Guide Sheet”. The information obtained, must be shared with the General Manager to enter into the Quote Log for future reference. The information can be exchanged with the completed form FM91, or other means as appropriate.

** Note: Our follow-up designee will use proper discretion with regard to contact frequency, so as not to alienate the customer, but this information is critical for future success.*

10. A second, third...etc follow-up may be necessary, each of which should be documented individually in the Quote Log for future reference.

AMENDMENT RECORD

Revision	Date	Details	Authority
A	04-15-04	Originated	C. Crosson
B	03-11-10	Amended to reflect current practice	C. Crosson
C	02-15-11	Amended to incorporate process flow diagram	C. Crosson
D	10-04-17	Amended to reflect current practice	C. Crosson

PMC Quoting Process

