



NEW CUSTOMER INFORMATION PACKET & QUESTIONNAIRE



“The first ingredient in building a successful contract service partnership is input.”

(To be filled out by the Contract Manager using input from the Customer.)


Document ID: F-SLS002	Effective Date: 01//01/2003	Replaces: NA
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New Customer Questionnaire

By answering the following questions, we will be able to better serve the customer's needs. These answers will allow us to identify the steps needed to produce the product(s). *Answer as best you can, and skip any questions you cannot answer.*

 **Note:** You can print this out and write down your answers, or you can use it onscreen with MS Word.

Company Name	Location	Remarks

Customer Contact Information (Sales, QC, Shipping, etc.)

Name & Title	Phone(s)	E-mail

General Product Information

#	Question	Product(s)	Type of Packaging
1	List all products to be run, then indicate types of packaging. If product(s) will only be mixed or spray dried, indicate "bulk" and type of container (e.g., drums, super sacks, etc.).		

General Production & Machinery Information

#	Question	Answer	Remarks
1	What is the expected volume daily, weekly, monthly, etc.?		
2	Are there "busy" or "slow" seasons? If so, when?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
3	Which processes will be in use?	<input type="checkbox"/> Batching <input type="checkbox"/> Mixing <input type="checkbox"/> Packaging <input type="checkbox"/> Drying <input type="checkbox"/> R&D	
4	Which building will this be produced in?	<input type="checkbox"/> Moore <input type="checkbox"/> Finnell <input type="checkbox"/> Dryer #1 <input type="checkbox"/> Dryer #2	
5	What machine(s) will be needed?		
6	Do we need to modify any machinery?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
7	Do we need any special equipment or tools? (tapers, checkweighers, coders, fillers, lab, etc.)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
8	Will any equipment be supplied to us?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
9	Will super sacks or drums be in use at any point? If so, explain type and source.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
10	How many people are needed? Packers,		



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	operators, mixers, mechanics, QC, forklift, etc.		
11	Any special cleaning requirements? (Kosher, allergens, etc.)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	

Costs & Related Financials

#	Question	Answer	Remarks
1	Will we need to allocate funds for startup costs?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
2.	How will billing be handled? (frequency, dates, who, etc.)		
3	Are there any key points BEI or the customer wants considered when determining costing? If yes, explain.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	

Product Documentation

#	Question	Answer	Remarks
1	Will we be given product descriptions, formulas, ingredient statements, dietary data, allergen assessments, etc.?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
2	Will we be given finished product specs, which guide production and QC acceptance criteria?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
3	Will we be given any written instructions?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
4	Will we be given any formatted records/forms?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
5	Will we be given written "quality expectations" (GMP, HACCP, etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	

Product Ingredients (Raw Materials)

#	Question	Answer	Remarks
1	What types of ingredients will be sent to us?		
2	Who will be ordering the ingredients?		
3	Who will be shipping ingredients/product to us? (List any suppliers)		

Packaging Materials & Supplies

#	Question	Answer	Remarks
1	If packaging materials have been identified, what are the individual pieces? (e.g., container type, labels, corrugated, chipboards, web, adhesives, inks, decals, etc.).		
2	Who will be ordering the packaging materials?		
3	Who will be shipping packaging material to us? (List any suppliers)		
4	Do we need to obtain any special chemicals or packaging supplies?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	



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Shipping & Receiving

#	Question	Answer	Remarks
1	Who will schedule and coordinate the pick-up and delivery of all finished product?		
2	Are there any specific controls or requirements for inventory reporting?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
3	Any special labeling requirements or order sequencing?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
4	Any special forklifts or moving equipment needed?(Clamper, slip-sheeter, pallet jacks, etc.)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	

Quality Control

#	Question	Answer	Remarks
1	Will there be any onsite QC testing needed? If so, indicate type and frequency	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
2	Will any samples need to be sent to the customer for testing?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
3	If an external laboratory is testing, has that lab been identified? (It must be certified.)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
4	Are there any specific requirements for sample retention?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
5	Are there any special provisions set for nonconforming (out-of-spec) product? In other words, do you want us to handle nonconforming products in a specific way?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
6	Are there any specific provisions set for rework?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
7	Are all codes and Product Identification Numbers (PINs) established?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
8	Are there any protocols established for Certificates of Analysis (COAs)?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
9	Any special equipment needed for testing?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	

Product Research & Development

#	Question	Answer	Remarks
1	Will we perform any type of product development, modification, or testing?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
2	Will we help design, pick, and/or choose packaging materials?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	

Miscellaneous Questions

#	Question	Answer	Remarks
1	Has another company ever produced this product(s)? If yes, who?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
2	If yes to #1, were there any problems that we should be aware of in order to perform better?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	
3	Will our facility be audited? If so, will we be given a copy of the customer's auditing	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/> ???	



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	guidelines so we know what to expect?		
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Please add any additional information of importance