

# MANUFACTURING TRANSFER CHECKLIST PLANNING

Consideration / Action	Customer	Manufacturer
<b>Assign experienced Project Managers (PMs) for both parties</b> <i>Clearly define roles and responsibilities. PMs are the conductors and must be knowledgeable and empowered to run the program.</i>	X	X
<b>Gather and share all product documentation</b>	X	
<b>Review product documentation to assure complete sets</b> <i>Run a careful check. Watch for drawings within drawings, layers of detail, accurate part numbers, etc.</i>		X
<b>Provide information on suppliers</b> <i>Include the Approved Vendor List (AVL) and any updates to it. Outline special pricing and discount arrangements. Report on current inventory.</i>	X	
<b>Inventory Assessment</b> <i>Is there a need for buffer inventory? Are there supplies at customer that should be shipped to CM?</i>	X	X
<b>Assess supply chain and part/product for End of Life (EOL)</b> <i>Is buffer inventory available? Does current demand for part or product indicate EOL? Are any parts obsolete? Are there shortages? Are value-add engineering efforts required?</i>	X	X
<b>Determine testing process</b> <i>Who owns the testing process? If owned by third party, can we use them? What is cost? Include validation plan detailing the process and timing. Provide “good” products to confirm testing.</i>	X	
<b>Re-validate testing process and equipment – ensure tests are repeatable and reproducible (R&amp;R) prior to full production</b>		X
<b>Document Transfer Plan</b> <i>Create a schedule to meet with weekly status calls (or more often). Allow for flexibility in plan (plan well, but expect the unexpected)</i>	X	X

# MANUFACTURING TRANSFER CHECKLIST COMMUNICATION

Consideration / Action	Customer	Manufacturer
<b>Define responsibilities for each partner</b> <i>Determine focal point for each team member</i>	X	X
<b>Determine “Pitcher / Catcher” responsibilities if ownership changes</b>	X	X
<b>Establish timing commitments for responses and hold to them</b>	X	X
<b>Set up weekly (or more often) status calls with quarterly executive business reviews</b>	X	
<b>Identify and communicate concerns ASAP – failure history, reliability, obsolescence, etc.</b>	X	X

# MANUFACTURING TRANSFER CHECKLIST MATERIALS

Consideration / Action	Customer	Manufacturer
<b>Create and share a detailed listing of suppliers, parts and materials</b> <i>Include AVL and any updates to the list. Are any parts obsolete or nearing EOL? Are the materials performing to expectations?</i>	X	
<b>Determine pipeline for the materials</b>	X	X
<b>Transfer excess/existing inventory from supplier to CM</b>	X	X
<b>Address obsolete materials</b> <i>Transition Lifetime buys.</i>	X	
<b>Identify and communicate underperforming materials</b> <i>Should value-added engineering (VAE) be applied to create a better performing material? If adding new, improved materials – plan new test and validation.</i>	X	X

# MANUFACTURING TRANSFER CHECKLIST TESTING & VALIDATION

Consideration / Action	Customer	Manufacturer
Determine who owns the validation plan	X	X
<b>Can current test equipment be transferred?</b> <i>Does it need to be replaced?</i> <i>Does it need to be replicated?</i> <i>Build timing considerations for testing into plan.</i>	X	X
<b>Define who owns: In-circuit tester (ICT),            Functional test systems and Fixtures</b>	X	X
Provide “known good” units to validate testing	X	
Build into the plan and allow for sufficient time to re-validate the testing system to ensure results are repeatable and reproducible (R&R)	X	X
Consider buffer inventory needs based on testing and validation schedules	X	X