

## Pre-Production Planning Meeting Outline

Customer Name		Meeting Date/Time	
Description		Job #	
Sr PM/PM(s)		Sales Rep	

- ☐ Schedule Meeting with Necessary Staff/Management | **BE SURE TO INVITE QUALITY MANAGER**
- ☐ Bring Samples of Product to Meeting to Share with Group
- ☐ Bring any Other Items/Examples Needed to Explain Project
  - I. Explain the **purpose of the meeting** (it is to highlight/discuss risks – ensure group understands job complexities – and to see if there are any opportunities for improvement or efficiencies);
  - II. **Step through project workflow (once-over review of entire job)** – then go back and identify the risk areas, or functions: (please discuss any issues you see and then ask for input)
  - III. After first pass overview go back, by each function/department, and **ask for specific risks, suggestions, or general questions.**

### MINUTES:


Action Points		Responsible Party	Due Date
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Final question for the group, ***“Do any of you have ANY other areas of concerns with other departments or functions that we need to think about? Are there any other risks associated with this job that we didn’t think about?”***

This is a key question – make sure you get an answer.

To close the meeting re-summarize everyone’s action points to ensure all leave with clear instruction(s) and/or next steps (next meeting, to-do’s etc.).

- ☐ In addition, send out a written email to all parties immediately following the initial pre-production planning meeting whereas you outline the discussion and decisions made during the meeting.
- ☐ Save a copy to the customer folder on the network drive to ensure access at a later time.
- ☐ One day BEFORE production begins please reconnect with all the parties to remind them of the job and resend the written email of instructions/highlights. (add outlook/calendar reminder if necessary to remind yourself to send, etc.)
- ☐ Make certain any important instructions/decisions are clearly captured in the LIVE TICKET for operators/shop floor.