Pre-Production Planning Meeting

Customer Name		Meeting Date/Time	
Description		Job #	
CSR		Sales Rep	

□ Schedule meeting with necessary staff/management

At meeting:

□ Explain Project

□ Present questions

□ Fill in all fields

□ Add additional items brought by attendees

□ Resolve all issues before proceeding

	Dates
Art Files In	
Data Files In	
Proof Out Date	
Proof Return Date	
Approval to Produce Date	
Ship Date(s)	
Mail Date(s)	
	Production
Material Availability	
Capacity Issues	
Capability Issues	
OS Services	
Freight Lead Times	
	Other

Store this completed form in job ticket

Why call a meeting? Here are some (not all) reasons:

Does the job have more than 3 finishing processes?
Is there a kitting or handwork component?
Are there specialty processes required?
Are there multiple drop dates?
Are there more than 2 versions?
Is the quantity extreme?
Does the customer require a firm due date?
Is there an outside service?
Is there a high degree of complexity?
Does it challenge our capacity or capability?
Are there unusual customer requirements?

Who can call a meeting? Anyone with a concern or observation about an upcoming project.

When to call a meeting? As soon as an issue comes to your attention. Do not wait. Its never too late.

How to call a meeting: Send an outlook invite for a half hour meeting in the scheduling office.

Who to invite: The manager of any department affected. Always invite CS, purchasing and the quality manager