**AE to PE HANDOFF MEETING NOTES**

Date:

Opportunity Number:

Project:

Description of the Project:

PE Name:

AE Name:

Note: This memo should be updated during the meeting between the AE & PE and saved to the POND in the folder labeled ***AE\_to\_PE\_Handoff\_Meeting\_Notes\_--\_Quality Record*** (General Project Files).

Agenda:

* Who was PE and the Engineering team for presale support (if applicable)?

Comments:

* Is the technical content of the purchase order (PO) the same as the latest revision of the full quotation? Yes  No 
  + Confirm what options in the quote and cost sheet that was selected if not clear in PO.
  + Has any aspect of scope changed? If yes, describe the changes.
  + Comments:
* Is a customer specifications/requirements document available, or did the customer buy MTS specs/performance? Yes  No 
  + Comments:
* Are the acceptance criteria clearly stated in the quote, or other document, to the point that the customer and MTS understand exactly what the acceptance criteria is? Yes  No 
  + Comments:
* Confirm from the purchase order and order summary sheet the agreed payment terms and if penalties are applied:
  + Comments:
* Confirm from the purchase order and order summary sheet the agreed shipping terms:
  + Comments:
* What pre-sale documents are available, if applicable?
  + PERT Record Yes  N/A
  + Cost Tool (CT) spreadsheet (if applicable) Yes  N/A 
    - Confirm Cost Tool (CT) spreadsheet match Sold Cost
  + OSS (final signed price review version) Yes  N/A
  + Responsibility Matrix (quote or separate document) Yes  No
  + OCG-040, FOAK, Team Review, CORRA Review Yes  N/A
  + ICD Yes  N/A
  + HRA Yes  N/A
  + Other technical documents as needed such as (system cable drawings, system hydraulic schematics) Yes  N/A

Comments:

* Open questions and areas follow up:
  + Examples: Cable lengths, Contractual issues, BOM discrepancies, etc.

Comments:

* Actions/owners of the issues (AE/PE/FAM RSM/Others):
  + Use table below to document any open questions or issues:

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| --- | --- | --- |
| **Issue** | **Owner** | **Expected completion date** |
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