

Complete this **before** you answer a larger-client supplier request. Bigger clients need paperwork, cash timing and delivery capacity — not only a good sales message.

Target opportunity

TARGET CLIENT / OPPORTUNITY

THEIR SUPPLIER PROCESS REQUIRES (FIRST ITEMS THEY ASK FOR)

Supplier pack inventory

Item	Have it?	Expiry / last checked	Action needed
Business name and contact details			
Registration documents			
Banking confirmation			
Tax information			
Proof of address			
Short business profile			
Quote / invoice templates			
References / examples of work			
Insurance			
Licences / permits / safety docs			

Business profile outline

WHAT WE DO AND WHERE WE OPERATE

WHO WE HELP

EXPERIENCE AND EXAMPLES

RELEVANT REGISTRATIONS, LICENCES OR INSURANCE

Can we take this work?

• CHECKLIST

- ☐ Price and expected profit have been checked
- ☐ Payment timing / cash gap is affordable
- ☐ People, tools and time are available
- ☐ Scope and approval will be in writing
- ☐ Existing customers will not be neglected

Cash-gap worksheet

Work out money you must spend **before** the client pays.

Cost type	Amount	When needed
Materials / stock		
Labour		
Transport		
Other		
Total needed before payment		

CLIENT PAYMENT DATE / TERMS

Delivery capacity

MONEY — CAN WE FUND THE GAP UNTIL PAYMENT?

PEOPLE / TOOLS — WHO DOES THE WORK, WITH WHAT?

INSTRUCTIONS / SCOPE — WHAT MUST BE WRITTEN DOWN?

EFFECT ON CURRENT CUSTOMERS

Payment and approval

WHAT DOCUMENT AUTHORISES THE WORK?

WHO MUST APPROVE THE WORK?

WHAT MUST APPEAR ON THE INVOICE?

WHEN DOES THE PAYMENT PERIOD BEGIN?

- **WARNING**

Do not rely only on a verbal promise for a large job

Write down scope, price, payment terms and approval before you commit large costs.

First missing item

MISSING ITEM

OWNER

DUE DATE