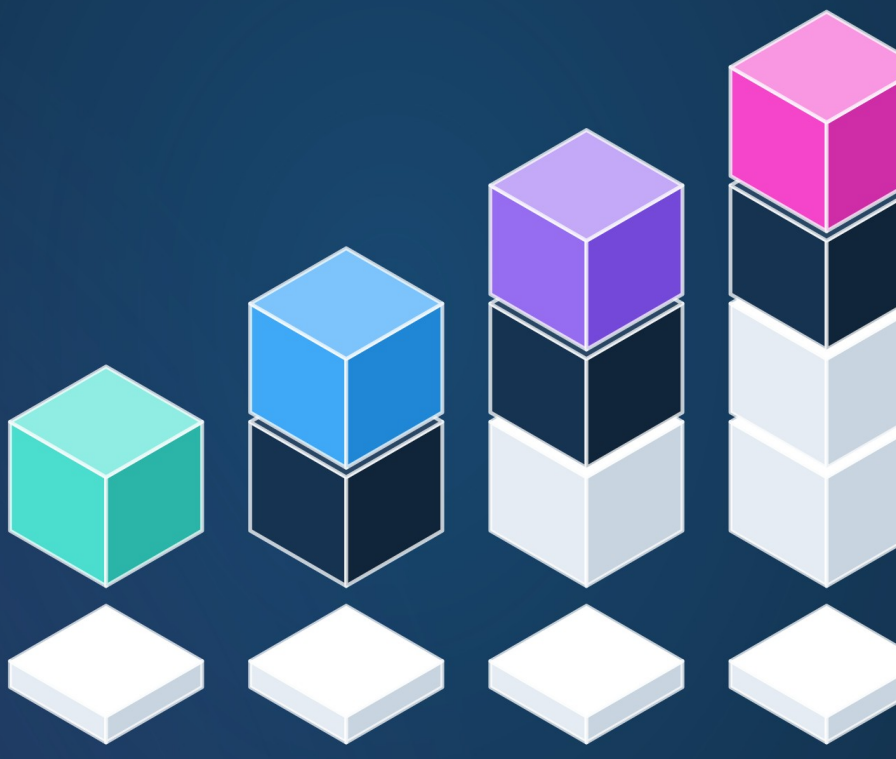
OPERATIONS INSIDER

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EQUIPMENT SPECIFICATION AND ACCEPTANCE QUICK START CHECKLIST

Score one equipment purchase in one hour, with documents you can point at.



SPECIFY. SELECT. TEST. HAND OVER.

START HERE

How to Use This Check

One equipment purchase, one hour with the project lead and the future users, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Take the last machine or line you bought, or the one you are buying now. Open the real files: specification, quotations, order, test records, open points list.	Score each statement from 0 to 4. Without a document you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across projects.
3	Mostly in place and visible in the project files.
4	Consistently in place, documented, reviewed and improved.

> **WHY THE SPECIFICATION**
>
> **A machine can only be accepted against what was written down before the order. What is missing in the specification is paid for later: in retrofits, in lost output and in arguments about who owes what.**

Before You Start

- **Scope:** one purchase of a machine, cell or line with its own order, from the first need to the end of the warranty period.
- **Evidence:** the specification, the quotation comparison, the order, the test protocols, the open points list and the handover record.
- **Tone:** you check how the plant buys, not the project lead. Ask what was written down, not who forgot it.

THE CHECK

01 Need and Requirements

NO.	CHECK	SCORE 0 TO 4
01	The need is written down before any supplier is contacted: product, variants, volume per year, working time and the date the equipment must produce.	
02	Takt time, required cycle time, availability and first pass yield are calculated from the demand, and the calculation is filed with the project.	
03	Requirements are collected from production, maintenance, quality, safety, controls and purchasing in a joint session, not by one engineer alone.	
04	Lessons from the last equipment purchase (delays, retrofits, open points) are listed and turned into requirements.	
05	Every requirement describes what the equipment must achieve, not how the supplier has to build it, unless a plant standard demands it.	

02 Specification and Acceptance Criteria

NO.	CHECK	SCORE 0 TO 4
06	A user requirement specification exists as one numbered document with one requirement per line.	
07	Every requirement is marked as must or want, and a quotation that fails a must requirement is excluded.	
08	Every requirement has a measurable acceptance criterion with a number, a unit and a sample size or duration.	
09	Every requirement names the method and the stage of verification: design review, factory test, site test or performance run.	
10	The specification is released by production, maintenance, quality and safety with signatures before the inquiry is sent.	

THE CHECK

03 Supplier Selection and Order

NO.	CHECK	SCORE 0 TO 4
11	At least three suppliers receive the same inquiry package with the specification, the layout and a deadline for questions.	
12	Quotations are compared against the requirement list line by line, and deviations are clarified in writing before the decision.	
13	Technical criteria and their weights are fixed before the quotations are opened.	
14	The comparison includes the cost over the planned years of use: operators, maintenance, spare parts, energy and installation on site.	
15	The order refers to the specification as a binding part, and payments are linked to passed acceptance stages.	

04 Design Review and Factory Acceptance

NO.	CHECK	SCORE 0 TO 4
16	The supplier answers the specification with a functional specification, and every requirement is traced to a section of it.	
17	A design review with operators and maintenance takes place before parts are ordered, and its findings are tracked to closure.	
18	Changes after the order go through a written change request with effect on cost, date and requirements.	
19	A factory acceptance test follows a written protocol with one test point per requirement, on parts from the real process.	
20	Shipment is released only when all points that block shipment are closed, and the release is signed.	

THE CHECK

05 Site Acceptance and Handover

NO.	CHECK	SCORE 0 TO 4
21	Safety functions, interfaces and the factory test points affected by transport are tested again after assembly on site.	
22	A performance run under production conditions proves cycle time, availability and first pass yield with the plant's own operators.	
23	All open points are in one list with class, owner and date, and final acceptance is signed only when the agreed classes are closed.	
24	Handover to production and maintenance covers documentation, training, spare parts and the maintenance plan, each with a signature.	
25	Faults in the warranty period are logged with date, cause and response, and a review takes place before the period ends.	

Your Result

BLOCK	POINTS	OUT OF
01 Need and Requirements		20
02 Specification and Acceptance Criteria		20
03 Supplier Selection and Order		20
04 Design Review and Factory Acceptance		20
05 Site Acceptance and Handover		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much of your next purchase is left to chance. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Bought on trust. The quotation of the supplier is the specification.	Write the need and the performance data for the next purchase on one page.
40 to 59	Specified. A requirement list exists, but criteria and tests are open.	Give every requirement a criterion and a verification stage.
60 to 79	Tested. Factory and site tests follow a protocol.	Add life cycle cost, the performance run and the open points classes.
80 to 100	Proven. Equipment reaches its output on the planned date.	Hold the level. Turn the last project into the template for the next.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check at the end of the next equipment project and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
STARTER KIT	The guide for the first 30 days from the need to a specification that can be sent out, plus the Excel workbook with performance data, requirement list and first quotation check.
EXCELLENCE BUNDLE	The full playbook, a two-day workshop pack, six templates, the Excel system with quotation comparison, life cycle cost, test protocols, performance run and open points, and a workshop deck.

Both are available at operationsinsider.com.