

GUIDE + PRINTABLE TOOLKIT

Start with a clearer requirement.

Electrical infrastructure sourcing works best when the application, equipment details and open questions travel together.

01 Define the work

Record the application, required configuration, quantity and destination before comparing options.

02 Separate facts from open questions

Identify the governing drawing or specification. Mark missing information and assign someone to confirm it.

03 Compare on the same basis

Ask each supplier to identify deviations, document revisions and the basis for availability and delivery timing.

04 Close the loop before ordering

Record decisions, confirm changes in writing and hand off the agreed requirement to the people receiving the equipment.

USE THE WORKSHEETS

02 / Requirement brief

03 / Supplier review

04 / Quote comparison

05 / Discussion prompts

06 / Contingency plan

07 / Order handoff

Print and write in the worksheet spaces. Keep completed copies in your own project records. This toolkit does not send or save information to Zeus.

WORKSHEET 01

Define the requirement.

Use one brief for each equipment package. Write "to confirm" where a detail is unknown; attach the governing documents when available.

Project / application / site

Equipment family, model or existing part reference / quantity

Required ratings, dimensions, materials and installation context

Governing drawing or specification / revision / approved manufacturers

Required date / delivery destination / receiving constraints

Open questions / person responsible / confirmation date

WORKSHEET 02

Review the supplier and evidence.

Use this checklist to structure a supplier conversation. Record evidence and unresolved questions; a completed checklist is not technical approval.

Review area	Question to resolve	Evidence / follow-up
Identity and scope	Who is quoting, supplying and manufacturing the equipment?	
Exact product	Which model, configuration and document revision are offered?	
Required documentation	Can the supplier provide the drawings and records your project requires?	
Substitutions	What differs from the request, and who must approve each deviation?	
Availability and timing	What is the dated basis for the quoted schedule, and what could change it?	
Delivery and support	Who handles freight coordination, receiving issues and product support?	

Suggested status for each item: confirmed with evidence / open question / not applicable. Keep the source, date and responsible contact with the response.

WORKSHEET 03

Compare quotes on the same basis.

Record the exact offer and its exceptions. Treat missing information as an open question, and resolve technical deviations before choosing equipment.

Requirement / comparison item	Supplier A	Supplier B
Supplier / quote number / date		
Model / manufacturer / document revision		
Quantity and units of measure		
Unit price / currency / extended price		
Freight, taxes and other included/excluded costs		
Availability basis / proposed ship date		
Delivery destination / receiving arrangements		
Required documents / deviations from request		
Quote validity / payment and warranty terms		
Questions, owner and follow-up date		

Ask suppliers to clarify any difference in scope. Record the evaluated total and assumptions in your project file; this worksheet does not calculate or recommend an award.

CONVERSATION GUIDE

Ask questions that close gaps.

Adapt these prompts to your requirement. Keep the supplier response and agreed changes with the quote or project file.

Confirm timing

"Our required on-site date is [date] at [destination]. What ship date can you quote for this exact configuration, what is that schedule based on, and which dependencies remain open?"

Record: dated response, shipping assumptions and next confirmation date.

Evaluate an alternative

"If the requested item cannot meet the requirement, what alternative can you propose? Please identify every deviation and provide the supporting drawing or specification revision for our review."

Record: differences, supporting evidence and the person responsible for technical approval.

Clarify the commercial scope

"Please separate equipment, freight and other charges, identify what is excluded, and confirm quote validity. If we change quantity or delivery sequence, what would change in the offer?"

Record: revised offer, assumptions and the version being compared.

Resolve a missing document

"We still need [document or answer] to complete the review. Who can provide it, by what date, and does the missing item affect the proposed configuration or schedule?"

Record: document owner, due date and impact on the next decision.

WORKSHEET 04

Plan for a procurement change.

Choose a trigger that calls for review, then record an action and owner. An alternative remains subject to your project requirements and approval process.

Project / critical equipment / activity that depends on it

Trigger / open risk	Response to evaluate	Owner / decision date

Acceptable alternatives / required evidence / approval owner

Communication plan: who needs an update, and when?

Illustrative trigger: a supplier cannot confirm a ship date by the project review deadline. Possible next step: request an updated schedule and evaluate an alternate source with the project team. This is an example, not a reported customer case.

WORKSHEET 05

Confirm the order handoff.

Before placing an order, align the final offer with your approved requirement and make sure the receiving team has the information it needs.

- ☐ Exact model, manufacturer, configuration and quantity match the accepted offer.
- ☐ Governing document revisions and any approved deviations are recorded.
- ☐ Quoted timing, dependencies, delivery location and receiving arrangements are clear.
- ☐ Commercial scope, quote validity and agreed changes have been confirmed.
- ☐ Required product documents and receiving checks have an assigned owner.
- ☐ Order contact, issue-reporting path and any return-authorization process are known.

Remaining decision / owner / date needed

Prepared by / reviewed with / project reference

Bring your requirement to Zeus.

Start with the application, a specification or a bill of materials. Share what is known and identify what still needs confirmation.

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Planning aid only. Final equipment selection and suitability depend on your project specifications and review by the responsible project team.