

# Risk Assessment Checklist - Sales Quote

Financial Risk considerations only. The ability to meet product requirements is assumed.

Customer Name: \_\_\_\_\_

Date: \_\_\_\_\_

	1	2	3	4	5	6	7	8	9	10	Notes
A	INSCO experience with company										
B	Credit Rating										
C	Terms currently extended to customer										
D	Payment days o/s										
E	Potential Profit										
F	Stock Item										
G	Non-standard Item										
H	Term Stock Held (weeks)										
I	Special Shipping/Handling										
J	Shipped Overseas										
<b>Total Score:</b>											

Note: Place 'X' (or any character) in appropriate box and it will calculate.

A score of 60 or higher is desired

**KEY**

- A 1 = New customer/unknown
- B 1 = D&B 90 days or >
- C 1 = Net 60
- D 1 = > 90 days
- E 1 = less than 10%
- F 1 = slow moving stock
- G 1 = non-cancelable/non-returnable
- H 1 = > 1 month
- I 1 = high cost of, or unusual handling
- J 1 = Customer requires INSCO to hire freight forwarder

- 10 = Known (or branch of) current customer
- 10 = D&B pays on terms
- 10 = Customer history pays faster than terms
- 10 = < 30 days
- 10 = 30% or more
- 10 = fast moving stock
- 10 = prepaid or cancelable/returnable
- 10 = not held
- 10 = no special shipping or handling required
- 10 = Customer supplies freight forwarder

Signature: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_