THE SECTOR FIELD GUIDES / OCTOBER 2026

Packaging & sourcing lead generation

Turn an enquiry into a viable sourcing brief.

A detailed operating playbook for building a relevant account list, earning an informed conversation, qualifying the next step and testing the commercial model.

24	05	08
Detailed chapters	Explained templates	Workbook sheets

UK contact-rule examples. GBP financial scenarios.

All worked examples are fictional. Methods, cadences and scoring models are operating proposals, not measured sector benchmarks or guaranteed results. No named clients, vendors or example companies are included.

Use the matching eight-sheet workbook alongside this guide. Keep qualification evidence, unknowns, decision owners and approved next actions visible.

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Read from the start for a new campaign. For a live campaign, start where the process is breaking.

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FIELD GUIDE / 01

Build a pipeline of viable briefs

A packaging enquiry is not yet a project. A brand can like a box design without having a viable project. Quantity, launch date, budget or product approval may still be missing.

The job of lead generation is to find suitable businesses and open useful conversations. Appointment setting should confirm a clear purpose and a relevant buyer. Check that the fit is strong enough to use specialist time.

This guide is for custom packaging suppliers, product sourcing firms, buying offices and manufacturing partners. It covers brand-led products, gift packaging, retail and e-commerce packs, accessories and overseas sourcing. It is not a consumer shopping guide or a plan for selling a sourcing course.

Define the first useful outcome

Aim for a qualified sourcing discussion. The buyer has a relevant product or packaging need, understands the purpose of the meeting and can help move the brief forward.

A quote-ready brief is a later stage. A sample approval, purchase order and collected payment are later stages again. Do not treat them as interchangeable.

Start in one hour. Choose one product family. Write the quantity, quality, timing and market conditions you can serve. Pick one buyer problem. Create one small first offer. Research five suitable brands and agree your meeting gates.

WORKING NOTES

Evidence rule. The methods and scripts are proposed operating tools. All examples and planning inputs are fictional unless stated otherwise. They are not sector conversion benchmarks, supplier quotes or promises of savings.

Check section 21 before outreach. Technical, product-safety, customs and legal decisions need the relevant qualified reviewer.

FIELD GUIDE / 02

Choose a buyer problem your supply chain can solve

Do not target “all brands that need packaging.” Start where your factory access, design skill and delivery process are relevant.

Segment to test	Buyer problem to explore	Essential capability check
Beauty and personal-care brands	Gift sets, launch packaging or accessories need coordinated development	Materials, finish, product contact and quality scope
Home, lifestyle and gifting brands	Custom packs and products must arrive as one finished presentation	Multi-component assembly and brand consistency
E-commerce brands	The pack must protect the product and suit fulfilment	Distribution, pack size and test requirements
Retail brands and private-label teams	Range changes need repeatable production and approved specifications	Volume, quality records and buying process
Agencies buying for brand clients	Creative concepts need a producible brief	Approval ownership, client permission and margin
Brands reviewing overseas sourcing	Existing supply has a cost, quality or capacity issue	Real supplier fit and complete landed-cost comparison

These are candidate segments, not claims that every brand has the same problem.

Set your commercial floor

Define a viable first order by contribution, not turnover or logo value. Check the minimum quantity for each material, process and design variant. A large total order may still be unviable when split across too many colours or sizes.

Name the product categories you cannot support. Food-contact packaging, children's products and other regulated items need specific competence and evidence. Do not accept a project merely because a factory says it can make it.

Campaign sentence: “We will approach [brand type] about [specific product or packaging problem], where the likely order and quality needs fit [our real capability].”

FIELD GUIDE / 03

Find timing signals, then ask about the brief

A signal is a reason to investigate. It is not proof that a brand wants a new supplier.

Verified signal	Where to find it	Useful question
New product or range	Brand announcement or product page	“Is the packaging brief still open?”
New retail listing	Brand or retailer announcement	“Do the pack and display requirements change?”
A planned seasonal range	Buyer discussion or published range plan	“When must specifications be locked?”
Rebrand or redesign	Official announcement	“Who owns structural design and production approval?”
A fulfilment change	Brand or logistics announcement	“Does the shipping pack need to change?”
Supplier review	Direct enquiry or authorised procurement process	“Which part of the current scope needs an alternative?”

A review complaining about a damaged parcel can point to a question. It does not prove a factory defect or a recurring packaging failure. Do not repeat a customer's complaint as a verified fact about the whole business.

Keep fact and hypothesis apart

Fact: “The brand has announced a gift range.” Hypothesis: “The range may need custom secondary packaging.” Question: “Is packaging development already placed, or is the brief still being scoped?”

Record source URL, event date, date checked, observation, likely buyer and what must be confirmed. Remove the signal when the project is completed or no longer relevant.

Use the brand's real planning window. Do not assume every seasonal project starts the same number of months ahead. Ask about the required delivery date and work backwards with the people who will

deliver it.

FIELD GUIDE / 04

Map the people who can approve the product

The person who likes a design may not own the order. The buyer who negotiates the price may not approve the sample. Map both.

Buying role	Decision or risk they own	Question that moves the brief
Founder or commercial lead	Brand goal and initial spending decision	“What must this project achieve?”
Product or new-product-development lead	Product specification and launch readiness	“What is fixed, and what is still being developed?”
Packaging or design lead	Structure, artwork and presentation	“Who approves the dieline and finished sample?”
Procurement or sourcing lead	Supplier route, price and terms	“What is required to qualify a supplier?”
Operations or supply-chain lead	Delivery, storage and production coordination	“What happens between factory release and your delivery date?”
Quality or regulatory lead	Tests, materials, claims and release evidence	“What must be demonstrated before approval?”
Finance	Margin, deposits and payment exposure	“Which cost and cash assumptions need checking?”

Start with the role closest to the problem. For a small brand, one person may hold several roles. For a larger one, ask for a joint working session only when the added attendee has a clear job.

Keep approval paths visible

Record who can approve the brief, sample, artwork, supplier and purchase order. Note who must be consulted. A sourcing meeting with the wrong approval path can produce weeks of free work and no order.

Do not assume authority from a title. Ask how this project will be reviewed. Record the answer in the handoff instead of labelling the person “decision maker” without context.

FIELD GUIDE / 05

Build a brand list, not a random product directory

Research businesses with a real route to purchasing your service. A directory full of suppliers is not a list of brand buyers.

Start with brand ranges, stockist pages and official launch news. Check relevant trade-show lists and retailer brand lists. Use prior customer introductions where the contact route is allowed. Check each directory's terms before using it.

Research in two passes

Pass one: the account. Confirm the brand and the legal or buying entity. Check its product family, sales market and current range. Then verify the reason for outreach. Check that the project fits your capability.

Pass two: the role. Find the relevant buyer or owner. Verify their role and permitted contact route. Screen against current customers, open quotes, partner-owned accounts and objections.

Search by a buying job: [brand] gift set launch, [brand] packaging redesign, [brand] new stockist, [category] private label brand or [brand] head of operations. A search result is a lead to verify, not finished evidence.

Minimum account record

Store the account ID, brand, buying entity and product family. Add the sales market, source, date checked and buyer role. Record quantity and timing status. Then name the contact route, owner and release status.

Do not record guessed production volumes as facts. Use “unknown” until the buyer confirms them. Do not infer a supply-chain location from a shipping label or a product photograph.

Quality test: another researcher should be able to explain why the brand belongs in the campaign using the record alone. If they cannot, the research is unfinished.

FIELD GUIDE / 06

Separate commercial fit from quote readiness

An early meeting does not need a final technical pack. But it does need a project that could plausibly fit.

Apply hard exclusions first. Reject product types you cannot supply and confirmed quantities you cannot meet. Check the deadline and sourcing rules. Do not contact a suppressed account or one with no permitted contact route.

Then prioritise the remaining accounts.

Factor	Weak or unknown	Developing	Stronger evidence
Product fit	Category unclear	Relevant product family	Brief fits a proven capability
Quantity fit	No range	Buyer has a broad range	Quantity and variants fit production
Timing	No planned decision	Buyer is exploring a window	Clear project and review dates
Buyer access	No relevant role	Buyer identified	Owner can progress the brief
Commercial need	General curiosity	One problem is plausible	Buyer confirms the problem and next step

Use this table to decide what to research next. It is not a probability model.

Do not over-qualify too soon

A design-led brand may need help forming the brief. That can be a good paid development opportunity. It is not automatically ready for a fixed production quote.

A buyer with a complete specification may only be collecting comparison prices. That can still be relevant. Ask about supplier approval and how the quote will be used before doing extensive work.

Routing rule: use an early scoping meeting for a relevant but incomplete brief. Use a quote review only when the key price variables are known. Decline work that cannot fit even after a reasonable change.

FIELD GUIDE / 07

Make the first offer useful and bounded

A free first offer should help the buyer make one decision. It should not require a full supplier search, a custom sample programme or unpaid product development.

Entry offer	Input	Output	What is not included
Quote-readiness review	One product or packaging brief	Missing fields and next approval steps	A binding production quote
Packaging risk review	Authorised photos or drawings and distribution context	Questions about fit, assembly and testing	Certification or a laboratory test
Landed-cost comparison brief	Comparable quote details and destination	A cost-category checklist and open assumptions	A promised saving or customs ruling

A clear offer statement

“Bring one product or pack. We will review what is known about quantity, design, quality and delivery. You leave with the gaps that must be closed before a useful quote can be prepared.”

That is a real result without promising that you will find a cheaper supplier.

Set a free-work cap that your economics can support. A short call and a one-page summary may be enough. Charge separately for design, samples, testing or supplier qualification when the work warrants it. Explain the next paid stage before doing it.

Keep the buyer's problem intact

Do not offer “lower unit cost” when the real issue is damage, inconsistent colour or missed launches. Ask which outcome matters most and which trade-offs the buyer can accept.

Good next step: an approved brief review with the product owner. Poor next step: a vague promise to “find the best factory” with no scope, price basis or decision owner.

FIELD GUIDE / 08

Use capability evidence instead of unsupported savings claims

Build a small evidence pack for the chosen segment. Show what the buyer needs to inspect, not every category you can source.

Four useful evidence items

A relevant capability sheet. State product families, materials, processes, supported markets and limitations. Do not imply that one successful box project proves competence in every regulated product.

A sample development record. Show how a brief became a drawing, prototype, approved reference and production specification. Redact client details and use only authorised material.

A quality plan. Explain where checks occur, what evidence is recorded and who approves release. Do not call a visual inspection a complete product-safety assessment.

A cost-scope example. Separate goods, tooling, samples, testing, freight, duties, handling, delivery and service fees. Mark what is included and what remains estimated.

ISTA's test families address different distribution conditions. Select the test with a competent reviewer for the actual package and route. A generic “drop tested” claim does not explain the protocol, sample or result.

FSC chain-of-custody requirements support traceable product claims. Check the actual certificate, its scope and the permitted claim. A factory's certificate does not give you blanket permission to use a logo.

Proof rule: state the scope of what the evidence supports. A sample, certificate or case study is not a blanket guarantee for the next order.

FIELD GUIDE / 09

Write outreach around a buyer decision

Use a verified observation and one useful question. Replace every bracket. Include a clear sender identity, contact details and a working opt-out.

Template 1: a new product range

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: packaging brief for [range]

Hi [first name],

Your announcement mentions [verified new range].

Is the packaging brief already placed, or are you still checking structure, quantity and delivery options?

We help [relevant brand type] turn a product and packaging brief into a producible scope. I can send a quote-readiness checklist before you request prices.

Would that be useful for this range?

[sender name] [business name and contact details] Not relevant? Reply "no" and I will stop.

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[range] — Use the actual product or specification at the right level of detail. Confirm process fit and quantity per variant before implying feasibility.

[first name] — Use the verified recipient's preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[verified new range] — Use a relevant, verified public fact. Save its source and date. State the observation without inventing pain, budget or buying intent.

[relevant brand type] — Use a verified, buyer-relevant detail that explains the reason for contact. Remove the line if it cannot be substantiated or adds no relevant evidence.

[sender name] — Use the real sender and required business identity and contact details. Do not invent an affiliation or conceal the authorising business.

[business name and contact details] — Use the real sender and required business identity and contact details. Do not invent an affiliation or conceal the authorising business.

Template 2: a gift-set project

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: gift-set production checklist

Hi [first name],

Does your team handle the packaging, accessories and assembly for gift sets separately?

We support projects where those parts need one clear brief and approval path. The first review checks quantities by variant, sample approval and the required delivery date.

Would a one-page planning checklist help your next suitable project?

[sender identity, contact details and opt-out]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[first name] — Use the verified recipient’s preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[sender identity, contact details and opt-out] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Do not imply knowledge of a live project when you only have a general use-case hypothesis.

What the copy leaves out

There is no invented percentage saving, fabricated supplier problem or claim that the prospect's current packaging is poor. The message offers a useful task. The buyer can request the asset without accepting a sales call.

If the brand is not reviewing anything, stop active pursuit or agree a later contact on the buyer's terms.

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Use different copy for packaging risk, sourcing and agencies

Template 3: a fulfilment change

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: packaging for [verified fulfilment change]

Hi [first name],

I saw [brand's dated announcement about the fulfilment change].

Will the shipping pack stay the same?

We help brands review the pack, product protection and production brief together. I can send a checklist for comparing pack dimensions, materials, assembly and test needs before suppliers quote.

Would that be relevant to the team handling the change?

[sender identity, contact details and opt-out]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[verified fulfilment change] — Use a relevant, verified public fact. Save its source and date. State the observation without inventing pain, budget or buying intent.

[first name] — Use the verified recipient’s preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[brand's dated announcement about the fulfilment change] — Use a relevant, verified public fact. Save its source and date. State the observation without inventing pain, budget or buying intent.

[sender identity, contact details and opt-out] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Template 4: overseas sourcing review

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: comparing the full sourcing cost

Hi [first name],

When your team compares an overseas supplier, do you use the quoted unit price or the cost of usable goods delivered to your destination?

We help [actual relevant category] brands organise that comparison. It includes tooling, quality checks, freight and the responsibilities in the quote.

Would the comparison worksheet be useful for a current or future review?

[sender identity, contact details and opt-out]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[first name] — Use the verified recipient's preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[actual relevant category] — Use a verified, buyer-relevant detail that explains the reason for contact. Remove the line if it cannot be substantiated or adds no relevant evidence.

[sender identity, contact details and opt-out] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Do not claim that moving production to China will save money or preserve lead time. Those are outcomes to assess for the specific product, route and terms.

Template 5: agency or design partner

ILLUSTRATIVE MESSAGE / ADAPT BEFORE USE

Subject: turning pack concepts into production briefs

Hi [first name],

Who checks production fit when your team designs custom packaging for a client?

We support [actual materials and scope]. I can share a brief checklist covering quantities, structure, artwork approval and sample sign-off.

It may help clarify where design ends and production coordination begins.

Would that be useful?

[sender identity, contact details and opt-out]

Why this structure is useful

A truthful observation establishes relevance. One operational question makes the decision specific. A bounded offer keeps the next step proportionate. A clear sender and stop-contact route let the recipient decline. These features do not establish permission to send.

[first name] — Use the verified recipient's preferred name. The greeting is not the personalisation strategy; relevance must come from their work.

[actual materials and scope] — Use the actual product or specification at the right level of detail. Confirm process fit and quantity per variant before implying feasibility.

[sender identity, contact details and opt-out] — Provide a clear, working stop-contact route and synchronise suppression. An opt-out does not establish initial permission to send.

Agree client ownership, permitted data sharing and any referral terms before working through a partner.

Turn partner interest into a clear referral route

Agree whether the partner wants a referral, joint delivery or a white-label production service. These models have different duties. State who owns the client, who may speak to suppliers and who approves design changes.

Ask for an introduction with the client's knowledge. Use a shared brief that records the design version, quantity, destination, deadline and unresolved production questions. Do not request an unrestricted client list or reuse a client's design as public proof.

Start with one suitable brief. Review design changes, quote turnaround, sample approval and contribution. A partner is valuable when the handoff produces viable work, not merely more concept enquiries.

FIELD GUIDE / 11

Use calls and follow-ups to improve the brief

Do not open with “we can source anything.” Start with the buying job.

A permitted call opener

WORKING NOTES

Hello [name], this is [your name] from [business].

This is a sales call about custom packaging and product sourcing. Is now a bad time for a brief question?

Who handles the production brief when your team develops [relevant product family]?

For the relevant buyer, ask: “Is the hardest part cost, getting the specification right, quality consistency or delivery coordination?” Do not assume all four are problems.

A short test sequence

Suggested timing	Action	Purpose
Day 1	Relevant email or permitted introduction	Ask one brief-related question
Day 5	Routing call or short follow-up	Confirm owner or send requested asset
Day 10	Relevant evidence or worksheet	Help the buyer assess one open issue
Day 15	Timing check and close	Agree a date or stop

These are test settings, not a sector response formula. Coordinate at account level. Stop automation on any human reply.

A useful follow-up

WORKING NOTES

One detail that often changes the quote is quantity per design variant, not just the total order.

The checklist separates those fields. For your review, is that details already fixed?

[sender identity, contact details and opt-out]

Use the observation only as a general pricing question, not as a claim about the buyer's quote.

No response is not permission to escalate through personal phone numbers, text messages or every social platform. Check the channel rules and the buyer's preferences.

FIELD GUIDE / 12

Resolve the objection without inventing a reason to switch

Objection	Response direction	Decision
“We buy direct from factories”	Ask whether there is a coordination, design or quality gap you can actually own	Relevant gap or stop
“We have a supplier”	Offer a future comparison framework without attacking the supplier	Buyer-led review or stop
“We only need the cheapest price”	Explain the scope needed for an equivalent comparison	Quote-ready or decline
“The minimum quantity is too high”	Check per-variant quantities and whether a simpler design is possible	Re-scope or no fit
“We need it very quickly”	Check the remaining design, sample and delivery stages	Feasible route or decline

Objection	Response direction	Decision
“The design is not ready”	Offer a defined development stage, with its fee and output	Development, not production quote

Direct-factory response

WORKING NOTES

Buying direct can be the right choice when your team can manage the specification, approvals, checks and delivery.

Our role is useful only where you need us to own part of that work. Which part, if any, is taking more time than it should?

Lowest-price response

WORKING NOTES

We can compare prices once the material, dimensions, finish, quantities, test scope and delivery terms match.

Without that, a lower figure may describe a different product or responsibility split. Would you like the comparison fields first?

Do not withhold a useful answer just to force a call. Do not promise smaller quantities or faster production before a supplier has confirmed them.

CRM rule: record the actual objection. “Not now,” “no fit,” “price only” and “no interest” require different actions.

FIELD GUIDE / 13

Define the qualified sourcing meeting

Agree the mandatory conditions before outreach. A positive reply is not enough. Use accept, hold and decline rather than one vague “lead” label.

Gate	What should be established
Buyer fit	The business is a relevant brand, importer, retailer or authorised buying partner
Product fit	The category and required service fall within your capability
Project purpose	The buyer can name a product, pack or sourcing decision worth discussing
Role	The attendee owns, influences or can progress the brief
Informed interest	The buyer understands the meeting is a commercial scoping discussion
Feasibility	No known hard conflict in quantity, quality, market or timing
Campaign rules	Any agreed minimum conditions have evidence
Exclusions	No suppression, duplicate or conflicting account ownership

What can remain unknown

Final artwork may still be open at an early scoping meeting. The full budget and test plan may also need more work. Record them. Do not invent them. If your campaign requires a confirmed quantity or deadline, an unknown becomes a hold.

Accept: a product manager wants to review a gift-pack brief, has a broad volume range and agrees to involve the packaging owner.

Hold: a brand asks for a production price but has no dimensions, quantity or material choice.

Decline: the confirmed order needs a process or compliance capability your supply base cannot support.

Qualification protects both teams. It stops sales from promising a quote before it is possible. It also protects specialists from hours of work with no viable next stage.

FIELD GUIDE / 14

Turn the conversation into a quote-ready brief

A request for quotation, or RFQ, is useful only when suppliers can price the same job. The meeting should expose the fields that are missing.

Brief field	What to record
Product and purpose	What the item is, what it contains and how it will be used
Dimensions and structure	Approved sizes, tolerances, construction and drawings where relevant
Material	Type, grade, composition and any required sourcing claim
Decoration	Print method, colour reference, finishes, branding and artwork status
Quantity	First order, annual expectation and quantity per variant
Components	Inserts, accessories, labels, assembly and packing responsibilities
Quality	Critical defects, inspection plan, approved reference and release owner
Testing and market	Destination market, use case and required evidence
Timing	Required delivered date and design, sample and approval milestones
Delivery basis	Named place, agreed trade term, currency and quote validity
Commercial terms	Tooling, samples, deposits, payment stages and ownership
Approval	Who signs off the specification, artwork, sample and order

Do not require the prospect to know all this before the first conversation. Use it as the output of scoping.

A version-control rule

Give the brief a version number and date. Record which sample, drawing and artwork file it references. When a field changes, identify what must be re-quoted or re-approved.

Quote gate: do not issue a binding price while a material cost driver remains undefined. Provide a clearly labelled estimate with assumptions, or agree a paid development step instead.

FIELD GUIDE / 15

Run a 25-minute scoping call

Use the call to understand one brief and agree the next decision. Do not run a generic sourcing presentation.

Minutes 0–5: define the project

“What are you trying to bring to market or improve?” “Which product or pack should we use as the example?” “What would make this a successful project?”

Separate the buyer's aim from your proposed solution. A request for “more sustainable packaging” needs a clear desired claim, use case and evidence requirement.

Minutes 5–12: check what is fixed

Ask about quantity by variant, dimensions, materials, artwork, assembly, destination and delivered date. Then ask: “Which of these can change?”

This exposes options. A fixed deadline with unfinished design is a different problem from a repeat order with approved specifications.

Minutes 12–18: understand quality and delivery

Ask who approves the sample and what tests or records are needed. Confirm how the goods will be used and who receives them. Confirm whether the buyer needs sourcing only or a finished, delivered product.

Minutes 18–22: map the buying path

Who chooses the supplier? Who approves spend? Is an existing supplier being replaced, backed up or retained? How will the buyer compare the options?

Minutes 22–25: agree the next output

Summarise confirmed facts, unknowns, owners and dates. The next step might be a completed brief, a development proposal, a sample plan or a closed file.

Close: “We can review production options after [specific gaps] are resolved. You will provide [input]. We will return [defined output] by [agreed date]. Is that the right next decision?”

FIELD GUIDE / 16

Compare landed cost on the same basis

A quoted unit price is not the full cost of usable goods at the destination.

Incoterms rules help define relevant delivery duties, costs and risks. Record the rule, named place and edition. Do not treat the term alone as a complete agreement on quality, payment or every project responsibility.

Use an itemised comparison. Check that costs already included in the supplier's term are not added again.

Fictional calculation, GBP

This is arithmetic only. It is not a quote, duty rate or shipping estimate.

Item	Fictional amount
5,000 packs at £1.80	£9,000
Tooling	£600
Agreed testing	£300
Non-duplicated origin and freight costs	£1,100
Assumed duty and handling costs	£400
Domestic delivery	£250

Item	Fictional amount
Total cost on this stated basis	£11,650

If 4,900 units are usable after the assumed losses, cost per usable unit is £11,650 ÷ 4,900 = £2.38, rounded.

The £1.80 quote and the £2.38 usable delivered cost answer different questions. Recoverable taxes, finance costs, storage and service fees are excluded from this example. Add them where they are real costs for the decision.

Before claiming a saving

Use equivalent specifications, quantities, quality standards, delivery terms, currencies and time periods. Include switching costs, testing, sampling, obsolete stock and internal coordination where relevant.

Do not count a lower price as a saving when it removes a required process or changes who carries the risk. A buyer should be able to inspect the comparison, not simply trust the headline.

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Work backwards from the required delivery date

The required date is usually a destination milestone, not the factory's production-finish date. Ask where the goods must be and what must happen before they can be used.

Build the critical path

Map brief approval, structural design and artwork first. Then add samples, tests and revisions. Include production booking, production and inspection. Finish with shipment release, freight, customs, delivery and receiving.

Assign an owner and a confirmed or estimated duration to each stage. Some stages can overlap. Others cannot begin until an approval is complete. Do not add every task as if all work is sequential, or overlap tasks without checking their dependency.

A simple planning conversation

“What date must usable goods reach your warehouse?” “What is the latest date the approved sample can be signed off?” “Who can approve revisions, and how quickly?” “What happens if a test fails or a component is delayed?”

Use supplier and logistics evidence for lead times. Do not use a universal claim such as “China production always takes six weeks.” Confirm actual factory capacity, closures, shipping route and current conditions.

Add decision buffers, not vague padding

Name the uncertainty that the buffer covers: a sample revision, a test rerun or a customs query. Record how the plan changes if the buffer is used.

Sales rule: when the brief cannot meet the deadline, say so before promising a quote. Offer a genuine alternative only when it is feasible: a simpler design, a different material, a staged order or another supply route. A rushed impossible project is not a qualified win.

FIELD GUIDE / 18

Make quality and sustainability part of the qualification

Ask what the buyer needs to prove, not whether they want “high quality.” Define the key checks. These may include fit, colour, finish, strength, leakage, print position and assembly. Add the requirements of the actual product.

Create an approval path from specification to sample to production. Identify the approved reference, defect categories, inspection scope and release owner. A passed sample is not proof that every unit will match it.

For transit performance, choose a relevant test protocol rather than a generic claim. For forest-based materials, verify the chain-of-custody scope and the specific claim being made.

Ask about environmental claims early

What exact claim will appear on the product, packaging or website? What part of the item does it cover? What evidence supports it? Who approves it?

The CMA's Green Claims Code is a useful UK reference. It covers truthful, clear green claims backed by evidence. “Eco-friendly,” “plastic-free” and “recyclable” should not be used as vague sales shortcuts.

UK packaging EPR obligations depend on actual business activities and thresholds. In the EU, the PPWR generally applies from 12 August 2026, with requirements that have different dates and conditions. Check current, product-specific guidance. Do not infer a prospect's obligations from its website or use a blanket compliance scare to book a call.

Boundary: the salesperson records the requirement and brings in the right reviewer. They do not certify a product or interpret customs law. They also do not approve a regulated material on a discovery call.

FIELD GUIDE / 19

Hand over the brief without hiding the gaps

This record is fictional. It shows a suitable early sourcing conversation, not a quote-ready order.

Field	Example B: beauty brand gift range
Buying entity	Established brand purchasing for its own range
Project	A gift pack containing products and a branded accessory
Buyer evidence	Fictional product manager confirms the project and broad quantity
Quantity	5,000 sets across two variants; exact split remains open
Requirement	Coordinated pack structure, accessory and assembly scope
Role	Product manager; packaging designer approves the structure
Timing	Required delivered date exists; supplier feasibility is not yet checked
Known gaps	Material choice, artwork, test scope and shipping terms
Meeting purpose	Complete the scope needed for development and production options
Acceptance	Accepted for scoping, not marked quote-ready
Next action	Buyer brings the current brief; sourcing lead prepares gap questions

Handoff rules

Attach the relevant reply and the brief version. Mark buyer-reported facts separately from verified documents. Keep confidential designs in an approved storage location, not in an open campaign tool.

The sourcing lead records the meeting outcome: no fit, development needed, RFQ-ready, sample stage or later review. Record the next owner and date.

Do not count sample approval as a purchase order. Do not count a tooling invoice as a full production win. Keep production orders, repeat orders and cash collection visible as separate events.

Use a structured meeting brief rather than “keen, needs packaging.” The detail should help the next person act, not make the lead sound better.

FIELD GUIDE / 20

Fund acquisition from the right margin

Two sourcing firms can handle the same goods value and have very different economics.

Trading model: revenue is the amount invoiced for the goods and related scope. Subtract landed goods, development, inspection, direct coordination and other order costs.

Agency or fee model: revenue is the fee or commission your firm earns, not the entire factory order value. Subtract the costs of earning and delivering that fee.

Do not mix the models. Do not count pass-through freight as pure margin.

Fictional campaign example, GBP

The fictional cohort contains 180 reached accounts and 9 positive replies. Five first meetings were due. Four were held and three were accepted. One led to a production order. Fully loaded acquisition cost is £2,000.

Measure	Calculation	Result
Positive account reply rate	9 ÷ 180	5%
Attendance	4 ÷ 5	80%

Measure	Calculation	Result
Cost per accepted held meeting	£2,000 ÷ 3	£666.67
Acquisition cost per won order	£2,000 ÷ 1	£2,000

In a trading example, a £30,000 order with £24,000 of direct costs contributes £6,000. It leaves £4,000 after acquisition, before other overhead.

In a separate fee-model example, a £4,000 sourcing fee with £1,500 of direct costs contributes £2,500. It leaves £500 after the same acquisition spend. These are separate models, not two earnings streams to add together.

One fictional win does not establish a reliable win rate. Use mature cohorts and a downside case. Model repeat-order contribution only over a stated period with realistic reorder and service assumptions.

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Protect contact permission, designs and sensitive data

This is an operating checklist, not legal advice. Review both the sender's obligations and the target market's rules.

For UK outreach, subscriber type affects electronic-marketing rules. Personal business data still needs an appropriate lawful basis and transparency. The channel matters: email, calls, texts and social messages are not interchangeable permissions. Identify the sender, provide an opt-out and honour objections.

Record the source, purpose, channel decision and suppression status before release. Buying a contact list does not remove your responsibility for how it is used.

Check sender authentication and the current requirements of the providers used by your recipients. Requirements vary by recipient mix and volume. Authentication does not establish consent or guarantee inbox placement.

Separate prospecting data from project data

A prospecting record might need a business name, role, public source and contact decision. A live sourcing project may contain unreleased artwork, supplier pricing, product specifications or customer details.

Keep that material in approved project storage with controlled access. Agree confidentiality and permitted sharing before sending it to factories, freelancers or software tools.

Do not request bank details, full supplier contracts or private customer data merely to qualify a meeting. Ask only for the details needed at that stage.

Stop conditions: unclear contact permission, unresolved objections, false sustainability claims, unsupported product capability, or a request to share designs without authority. A promising order does not override those limits.

FIELD GUIDE / 22

Control free work, samples and cash exposure

A busy quote desk can hide a weak pipeline. Track time spent on briefs, supplier searches, development, sample coordination and revisions.

Decide what is free and what is paid

Keep the initial fit review bounded. Define the output. Before deeper work, agree the scope and fees. Set out sample and test costs, revision limits and what happens next.

Do not promise that every sample or design fee will be credited against production unless your actual terms say so. Do not imply ownership transfers before the contract defines it.

Check the cash path

Map when you pay factories, designers, labs and freight providers. Then map when the buyer pays you. A profitable order can still require cash you do not have.

Use milestone dates and amounts. Include deposits, balances, refunds, replacement exposure and delayed approvals. Check the downside before accepting an order that requires a large advance payment.

This is a cash-planning method, not advice on the legal form of payment terms.

Review one queue each week

Look at briefs waiting for buyer input, quotes with no decision date, samples awaiting approval, orders awaiting deposit and goods awaiting release. Assign one owner to each blocked item.

Close stale quote requests rather than refreshing prices forever. Reopen them when the buyer supplies a new brief or decision date.

Scale rule: check the quote and sample process before adding leads. It must handle the extra work without harming margin, quality or cash control.

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Launch the acquisition system in 30 days

Use the month to install a working process and learn. Do not judge production-order revenue before the buying cycle has had time to finish.

Period	Owner	Deliverable	Review question
Days 1–5	Commercial and sourcing leads	One product-family brief and meeting standard	Can the supply base deliver this scope?
Days 6–10	Research owner	Verified first brand batch and buyer map	Are these buyers, not competing suppliers?
Days 11–15	Outreach owner	One bounded offer and approved sequence	Do replies reveal relevant briefs?
Days 16–20	Sourcing lead	Scoping calls and documented next steps	Which missing fields prevent a quote?
Days 21–25	Quality and operations leads	Updated evidence pack and scope limits	Are quality and delivery promises supportable?
Days 26–30	Commercial lead	Cost, workload and cohort review	Continue, revise, stop or test another segment?

Run one meaningful test

Compare one variable: the entry offer, buyer role or segment. Hold the other major choices stable. Set a budget and review date before launch.

Measure accepted held meetings per released account. Then follow accepted briefs, RFQs, samples, production orders and collected contribution. A cheap meeting that never becomes a viable brief may be expensive in practice.

Record counts alongside rates. A small batch with one order is useful evidence, not proof of a dependable conversion rate.

The next commitment should be reversible. Add a controlled batch or improve one brief field. Do not hire a large team or promise a fixed order volume from the first encouraging replies.

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Use the working templates and final checks

The companion workbook includes a campaign brief, account register, meeting gates, economics, an RFQ worksheet and a landed-cost model. The web edition includes a browser-based qualification check with a downloadable decision record.

Campaign brief

WORKING NOTES

Product family and supported processes: Target brand type and destination markets: Viable quantity by variant: Quality and compliance limits: Signal sources and evidence rules: Buyer role and approval path: Entry offer and free-work boundary: Permitted contact route: Meeting gates and quote-ready gates: Owners, budget, dates and success measure:

Meeting handoff

WORKING NOTES

Account and brief version: Buyer role, authority and reason for interest: Product, quantity, variants and delivered date: Confirmed specifications: Unknown specifications and approval owners: Quality, testing and claims to review: Meeting purpose and promised output: Accept / hold / decline, with evidence: Next owner, task and date:

Final check

Before outreach, confirm a real buyer problem and a viable supply capability. Before the meeting, confirm informed interest. Before quoting, align the price variables. Before sampling, agree scope and approvals. Before production, confirm specifications, quality, terms and cash. Before scaling, check contribution and the work left in the queue.

The rule to keep: better sourcing pipeline produces clearer briefs and safer commercial decisions, not just more requests for a price.

Discuss your campaign

Use the companion workbook to record your campaign boundaries, evidence, qualification decisions and next actions before increasing activity.

References & scope

Official and industry references support factual context, not the proposed methods or fictional calculations. This is a planning framework, not legal, tax, engineering or investment advice. Check current requirements with the responsible specialist before use.

International Chamber of Commerce: Incoterms rules

Trade rules allocate relevant delivery duties, costs and risks. They are not a complete sales contract.

Open the official reference

ISTA: Test procedures

Select a test for the actual distribution environment. A test result is not a guarantee for every shipment.

Open the official reference

FSC: Chain of custody certification

Traceability and claims context. Verify the certificate, scope and permitted product claim.

Open the official reference

UK Government: Check if you must comply with EPR for packaging

Check the actual producer activity, group, turnover and packaging volumes. No account-specific obligations are inferred.

Open the official reference

European Commission: Packaging waste

PPWR context. Requirements have different application dates and need product-specific review.

Open the official reference

CMA / UK Government: Green claims code: making environmental claims

Environmental claims need evidence and clear limits. It does not certify any supplier or product.

Open the official reference

ICO: Business-to-business marketing

UK marketing guidance. The ICO flags parts of its guidance for review after legislative change.

Open the official reference

ICO: Plan direct marketing

Channel, subscriber and data-protection requirements. Not blanket permission for any list.

Open the official reference