

NEW PRODUCT HANDOVER

CHECKLIST

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Checklist

Introduction

Why do we need a New Product Handover checklist?

A handover of a new product is an excellent opportunity for you as a sales person to create a positive experience around the MULTILIFT product and also to build a good relationship to the customer or end user. Handovers are performed in different ways in different sales companies. In order to find a harmonized way of making a new product handover a checklist has been put together. In this check list we highlight topics valuable for the customer to be informed about.

This guideline will show you how to use it.

About the checklist

Use the checklist during the entire handover. Carefully read it through and make sure you understand the content before meeting with the customer. The checklist is not to be seen as operator's training but is merely informational.

From this point forward the customer/end user will be referred to as "the customer" in this document.

The checklist has been divided into two steps. Step 1 is a checklist of all preparation that has to be made before the actual handover. Step 2 is a checklist being used when meeting with the customer. The handover can take up to two hours depending on demountable model, type of installation and prior experience of the customer. Each item on the list has two check boxes:

Completed (the customer has been properly informed)

Not applicable (e.g. equipment not available on this model)

After the handover is completed the checklist will be stored at the installer or workshop. The handover confirmation (last page of this checklist) is to be signed by the person performing the handover as well as the customer. A copy of the page is given to the customer to be kept with the documentation provided with the MULTILIFT product.

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Step 1. Before meeting with the customer

On the product

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- ☐ ☐ **1.1** Have a short briefing with the installer of the demountable to make sure the installation has been properly performed.
- ☐ ☐ **1.2** Make sure that you are familiar with the vehicle carrying the demountable
- ☐ ☐ **1.3** Make sure you are familiar with the operator's manual

Where the handover will be taking place

1.4 Make sure you have access to:

- ☐ ☐ Enough space to fully operate the demountable

1.5 Make sure to bring with you:

- ☐ ☐ Operator's manual for the specific demountable
- ☐ ☐ Operator's manual for accessories/add-on equipment
- ☐ ☐ Service and warranty manual
- ☐ ☐ CE-conformity declaration
- ☐ ☐ Delivery card printout form C-Care
- ☐ ☐ Inspection certificates (if applicable)
- ☐ ☐ Country-specific documents (if applicable)
- ☐ ☐ Service contact details
- ☐ ☐ Camera (optional)
- ☐ ☐ Handover checklist

- ☐ ☐ **1.6** Make an appointment for the handover. Make sure there is enough time to cover everything.

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Step 2. Handover checklist

Knowledge required

2.1 Operator's manual:

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- ☐ ☐ Explain that the manual has to be studied and understood before operating the demountable.
- ☐ ☐ Inform that the manual has to be stored in the cab the truck at all times.
- ☐ ☐ Explain the content of the different chapters of the manual (highlight safety related issues)

Structure and parts of the MULTILIFT product

- ☐ ☐ **2.2** Point out and explain the parts of the demountable (frames, hooks, chains, locks, add-on equipment (if present), identification plate)

Safety precautions and warnings

- ☐ ☐ **2.3** Point out on the demountable and explain the meaning of the warning signs
- ☐ ☐ **2.4** Explain how to lift the container correctly
- ☐ ☐ **2.5** Explain that the operator must keep moving parts in sight during operation
- ☐ ☐ **2.6** Inform and point out all stop buttons in case of danger (if applicable)
- ☐ ☐ **2.7** Inform about risks while starting demountable operation
- ☐ ☐ **2.8** Inform about risks during preparation for use
- ☐ ☐ **2.9** Inform about risks during demountable operation
- ☐ ☐ **2.10** Inform about risks when driving with the demountable

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C N *The safety system*

- ☐ ☐ **2.11** Explain main control valve functions (if applicable)
- ☐ ☐ **2.12** Point out and explain button, LEDs/display and joy-stick/buttons functions on the hand controller
- ☐ ☐ **2.13** Explain how to use battery charger and batteries (if applicable)

Starting demountable operation

- ☐ ☐ **2.14** Inform about proper ground surface and inclination of the vehicle to guarantee a safe demountable operation
- ☐ ☐ **2.15** Show how to connect the PTO

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During operation

- ☐ ☐ **2.16** Explain and demonstrate the right way to load, unload and tip the container

Ending demountable operation

- ☐ ☐ **2.17** Explain, show and let the customer operate the demountable to parking position.
- ☐ ☐ **2.18** Show how to disengage the PTO.
- ☐ ☐ **2.19** Explain how to perform an emergency operation. Also, explain the risks of operating the demountable in such a way.

Maintenance and service

- ☐ ☐ **2.20** Service
Hand over the contact information for person to contact at a HIAB service workshop in case of problems.
Explain which information is needed when contacting the service workshop (serial number, error code (if available), description of symptoms)
- ☐ ☐ **2.21** Warranty
Inform about standard warranty conditions (information can be found in the manual for Service and warranty)
Inform about extended warranty (the benefit of it and how to get it if the customer does not already have it)
- ☐ ☐ **2.22** Maintenance
Go through together with the customer and:
 - Inform the customer about the first service and the importance of making the first service.
 - Show how to carry out daily and monthly inspection.
 - Inform that the demountable need annual maintenance at an HIAB workshop. Point out the benefits by servicing the demountable at an HIAB workshop.
 - Explain lubrication and lubrication schedule. Show where the grease nipples are located and point on the accessibility.
 - Show where information can be found in the operator's manual regarding basic maintenance like changing oil and replacing filters
- ☐ ☐ **2.23** Show the customer where to find information on troubleshooting in the operator's manual.

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C N *Additional information*

☐ ☐ **2.24** Handling of additional equipment (operation, mounting, dismounting):

- Trailer tipping
- Crane
- Cover system
- URB
- Stabilazer roller
- Bogie blocking
- Additional hydraulics
- Other equipment: _____

☐ ☐ **2.25** Training:

Explain training possibilities for operators, local courses.

Again inform about local regulations about demountable operation, maintenance and inspection (e.g. road regulations)

☐ ☐ **2.26** Ask the customer for additional questions

☐ ☐ **2.27** Ask the customer if all the items has been fully understood. If yes, mark the box

☐ ☐ **2.28** Handover the following documentation:

- Delivery note
- CE-conformity declaration
- Operator's and Service manual
- Country-specific documents
- Manuals for additional equipment
- Confirmation page from this document

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Handover confirmation

Date: _____
Demountable model: _____ Serial no. _____
Customer/Company name: _____
Person who performed the handover: _____
Company (installer or dealer): _____

Following customers received the information in this handover checklist:

Person 1

Signature	Clarification of signature
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Person 2

Signature	Clarification of signature
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Person 3

Signature	Clarification of signature
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Person 4

Signature	Clarification of signature
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Person performing the handover

Signature



Note that this handover does not replace a proper operator's training. Local regulations may require proper training before operating a demountable. Find out which rules apply in your country.