Sample output — Engagement report. *This report was generated from a fictional facility walkthrough using TripDeck's actual Engagement output format. The company, host, findings, and follow-up items are illustrative. Real reports are populated from your typed and dictated notes, photos, and any contact cards captured during the visit. Compare this to the Expo/Roadshow sample to see how the two templates differ.*

Engagement Report — Aureus Composite S.R.L. Facility Walkthrough

TripName: 202608_Ploiesti_AureusComposite
Trip Type: Engagement (facility walkthrough)
Date of Visit: 12 August 2026, 09:30–14:15 local
Location: Aureus Composite S.R.L., Str. Industriei 42, Ploiești, Prahova County, Romania
Host Organization: Aureus Composite S.R.L. (illustrative persona: mid-market composites & polymer-tooling manufacturer, ~180 FTE)
Visit Purpose: Downstream-integration partnership assessment — evaluate Aureus as a potential composite-shroud supplier for our deployable-shelter line, ahead of a Q4 sourcing decision.
Attendees (visiting side): BD Lead (author), one accompanying technical adviser (remote consult on structural questions).
Attendees (host side): Andrei Popescu (Commercial Director), Mihai Ionescu (Plant Manager), Roxana Neagu (Quality Lead), Cătălin Dobre (Shift Supervisor — Molding Hall B).
Author: BD Lead — EMEA

Executive Summary

Aureus Composite is a credible candidate for the composite-shroud subcontract on our deployable-shelter line, with meaningful caveats. The plant is well-organized, the leadership team is technically fluent, and the existing product mix (automotive interior tooling, agricultural-machine paneling, one small defense subcontract under a Bucharest prime) means they understand what a quality regime looks like beyond a purely commercial context. Where the picture gets more mixed is capacity: Molding Hall B — the hall that would take our work — is running at an estimated 75–80% utilization on their current book, and their tool-store is tighter than they let on in the opening meeting. A partnership is workable, but only if we lock the tooling investment and the shift plan before we place the first production order. Recommend proceeding to a follow-up technical review within two weeks, conditional on the items in §Risks being addressed in writing.

Observations & Findings

1. Plant is genuinely organized, not just tidied for the visit.

5S markings are worn (a good sign — they've been there a while, not painted last week), tool trolleys were in designated bays with named tags, and the incoming-goods area had a working red/yellow/green tag system on quarantined pallets. Mihai (Plant Manager) walked us into an unscheduled part of the floor without hesitation, which usually means there is nothing being hidden.

2. Molding Hall B utilization is higher than the opening pitch suggested.

Andrei opened the meeting with "we have capacity." On the floor, three of the four presses in Hall B were running, the fourth was in a scheduled tool-change, and Cătălin (shift supervisor) mentioned the third shift was recently reinstated on the automotive contract. My rough estimate from the visible run-boards is 75–80% utilization on a two-shift basis, higher if the third shift stays on. This is not disqualifying, but it means our work would either displace something or require capital-equipment addition.

3. Quality regime is credible but paper-heavy.

Roxana walked us through an ISO 9001:2015 recertification (dated March 2026) and a small IATF 16949 scope for the automotive interior work. First-article inspection paperwork was in binders, not in an eQMS. She acknowledged an in-flight tender for a QMS software package but no procurement decision yet. For our program this is workable, but if we later want traceable digital records at each production step, that gap is on us to close jointly or to accept.

4. Tool-store is tighter than represented.

The dedicated tooling room at the back of Hall B was full to the wall on both racking systems, with several tools tagged for return-to-supplier and at least two labeled "awaiting rework — vendor dispute." The plant manager did not offer to open the vendor-dispute conversation, and I did not press. If our tooling package is going to live here permanently, we need dedicated space earmarked and locked to us — a shared shelf with a disputed-tool problem is a supply-chain risk waiting to happen.

5. Existing defense subcontract is real but marginal.

Aureus does a small run of non-critical composite housings under a Bucharest defense prime (they were careful not to name the prime and I did not ask). Roxana referenced "specific documentation controls" for that work which are handled in a segregated corner of the QA office. This tells us they have been screened at least once by a Romanian defense buyer. It does not tell us they would pass ours — our program's requirements are almost certainly stricter than the local subcontract they hold today.

6. Material sourcing is Central-European and short-chain.

Prepreg and resin suppliers are in Germany, Czech Republic, and one Italian source. Andrei was open about lead times (8–14 weeks on the German resin, worse on the Italian prepreg through Q3). No China dependency on the primary material chain, which is what we needed to hear. There is a secondary consumables dependency on Chinese release-film and vacuum-bag material that Roxana called "routine" — this is probably fine but is worth naming in a compliance narrative rather than being surprised by it later.

7. Workforce is stable and technically capable.

Employee turnover was self-reported at ~7% annually and the shift supervisor had been in the same role for eleven years. The floor conversation with two machine operators (Cătălin translating) was substantive — they asked about our target part geometry, which suggests they had been briefed properly before our visit and are used to variant work, not just a single-part-forever line.

8. Commercial responsiveness was slower than the visit suggested it would be.

This is the softest finding — Andrei promised follow-up material (updated capacity chart, sample tooling quote, current QMS roadmap) "by end of week." As of the report generation window it has not arrived. This may be nothing, but our own follow-up cadence should treat it as a small yellow flag until the material lands.

9. Physical site security is at industrial-baseline, not defense-grade.

One gate, one gatehouse, RFID badge on the pedestrian door, no CCTV coverage at the loading dock that I could see from the floor. Fine for the automotive book. Below what the deployable-shelter program's downstream customer will expect for controlled work-in-progress, which means we will either pay to upgrade this or partition the sensitive parts of our work to a different vendor.

10. Leadership succession is a soft question.

Andrei is the son of the founder and the founder was in the office during our visit but not part of the meeting. This is a family business in generational transition. It is not a red flag on its own, but it is worth naming as a factor in any multi-year commitment we make.

Risks

Capacity risk (medium). Hall B utilization is higher than the opening pitch suggested. If we place a production order without a locked shift plan and dedicated press allocation, we risk being queued behind the automotive contract in a demand spike. Mitigation: contractually reserved capacity, with an explicit displacement clause if Aureus takes on new automotive volume.

Tooling and IP risk (medium). Shared tool-store with visible vendor disputes is a bad neighbor. Any tooling we finance needs its own physical bay, its own asset tag, and its own removal-on-termination clause.

Quality-documentation risk (low-medium). Paper-based QMS is workable for a first program but will not scale to the downstream customer's audit expectations. Mitigation: co-fund or co-time an eQMS rollout as a milestone in the partnership agreement.

Physical-security risk (medium, program-dependent). Baseline industrial security is fine for early prototypes and non-controlled runs. If the downstream customer flags controlled-technology handling requirements, Aureus is not compliant today. Mitigation: partition sensitive work, or make security upgrade a contractual precondition to controlled-run orders.

Commercial responsiveness risk (low, monitored). Promised follow-up material has not arrived. Not a blocker yet; is a yellow flag to watch through the next interaction.

Succession risk (informational). Family-business generational transition is worth naming in any multi-year commitment. Not actionable on our side today.

Recommendations

1. **Proceed to a technical-fit review within 14 days,** conditional on Aureus delivering the promised capacity chart, an indicative tooling quote, and a written statement on dedicated Hall B allocation.

2. **Do not commit to a production order** until the tooling-bay, shift-plan, and security items in §Risks are addressed in writing.

3. **Frame the partnership as staged** — a small prototype run first (10–20 units, one variant), followed by a gated Phase 2 that unlocks full production only once quality and delivery evidence exists.

4. **Bring the downstream customer's compliance officer** into the second visit. Aureus needs to hear the security bar directly, not filtered through us.

5. **Keep a second-source candidate warm.** Even if this progresses well, single-source composite supply for a deployable program is fragile. Recommend keeping the Kraków candidate active through end of Q4 as a hedge.

Follow-up Actions & Considerations

Uncapped by design. Every item that came out of this visit is listed below — nothing has been Top-N'd. Owner, timeline, and reason are attached to each. Where the owner is **us**, the visiting side is responsible; where the owner is **Aureus**, we are waiting on the host.

Item	Owner	Timeline	Why
Send Aureus a written meeting recap within 48 hours	Us	Immediate	Locks the shared understanding before the follow-up material arrives, and sets the tone that we document what we agree to.
Chase promised capacity chart and tooling quote	Aureus	Immediate	Overdue as of report generation; a yellow flag if it drags past one week.

Item	Owner	Timeline	Why
Confirm downstream customer's controlled-technology handling requirements in writing	Us	Immediate	We cannot negotiate Aureus's security bar until we know exactly what the downstream customer requires.
Draft partnership term-sheet skeleton (staged, gated, dedicated tooling bay)	Us	2 weeks	Puts a written frame around the recommendations above; forces internal alignment before the second visit.
Schedule technical-fit review (structural adviser + Aureus engineering + Roxana on QA)	Us + Aureus	2 weeks	The 30-minute floor conversation on part geometry needs to become a working session with drawings.
Verify Aureus's ISO 9001:2015 and IATF 16949 certificates via issuing-body registry	Us	2 weeks	Trust-but-verify. Roxana had the paper; a registry check is standard due diligence.
Ask Aureus to name their Bucharest defense prime under mutual NDA	Us	2 weeks	Not to poach the relationship — to understand what screening they have already passed.
Request written statement on dedicated Hall B allocation and shift plan for our program	Aureus	2 weeks	The single most important commercial commitment before we place a production order.
Request a walkthrough of the vendor-dispute tooling situation	Aureus	2 weeks	We did not press in the meeting; we need to press before we commit our own tools to a shared space.
Get a written sample of Aureus's FAI (first-article inspection) documentation	Aureus	2 weeks	Paper-QMS is workable but we need to see what "paper" actually looks like on their side.
Prepare internal capital-planning note on Molding Hall B press addition	Us	30 days	If Aureus cannot dedicate a press to us, funding one is a fallback path — needs a budget frame before the next visit.
Second visit — with downstream customer's compliance officer	Us + Aureus + Customer	30 days	Compliance conversation is more credible from the customer's mouth than ours.
Cost model — Aureus vs. Kraków candidate at prototype and production volume	Us	30 days	Side-by-side numbers force a real second-source hedge decision, not a hope-and-pray one.
Update ICP file: add composites & polymer-tooling supplier row	Us	30 days	This visit sharpened our internal profile of what a good composite-shroud supplier looks like — capture it while it is fresh.

Item	Owner	Timeline	Why
Verify Aureus's Chinese release-film / vacuum-bag secondary supply chain	Us	30 days	"Routine" is not the same as "documented and low-risk." Compliance narrative needs a line on this.
Assess implications of Aureus's family-business succession	Us	30 days	Not urgent; is a factor in the multi-year risk write-up for the internal partnership brief.
Prepare tooling-bay physical-security specification (badge access, CCTV, dedicated bay)	Us	30 days	If we finance tooling, we specify the environment it lives in. This is our specification to produce, not theirs.
Draft an eQMS co-funding proposal Aureus could accept	Us	30 days	Making it easier for Aureus to close their paper-QMS gap accelerates their audit readiness on our program.
Circle back with Roxana on QMS software vendor shortlist	Us	30 days	She mentioned an in-flight tender. Being helpful here builds relationship capital ahead of contract talks.
Sanity-check the Italian prepreg lead-time story with our own supplier network	Us	30 days	Aureus's Q3 lead-time picture is the sort of thing that should be triangulated, not accepted at face value.
Prepare internal go / no-go decision memo for Q4 sourcing committee	Us	Longer (before Q4 sourcing decision)	This report is the raw material for that memo. The memo itself is the artifact leadership will approve or reject.
Keep Kraków candidate warm through Q4	Us	Longer (through end of Q4)	Second-source hedge. Even a low-touch quarterly check-in keeps the option alive.
Post-decision retrospective — was the walkthrough read correct?	Us	Longer (Q1 2027, after first prototype run)	Improves our own visit-and-assess methodology; feeds back into TripDeck's own Engagement report template.

Total items: 23. TripDeck does not cap this list.

Contacts Encountered

Short and unranked — this is a supporting section, not the spine of the report. Only Andrei's card was captured during the visit; the others are recorded from meeting notes.

Name	Role	Company	Note
Andrei Popescu	Commercial Director	Aureus Composite S.R.L.	Primary host. Business card captured; enrichment attached in cloud folder.

Name	Role	Company	Note
Mihai Ionescu	Plant Manager	Aureus Composite S.R.L.	Technically fluent, walked the floor with us. Key contact for capacity and shift-plan conversations.
Roxana Neagu	Quality Lead	Aureus Composite S.R.L.	Owns the QMS conversation. Sharp on documentation; will be the technical counterpart on any audit prep.
Cătălin Dobre	Shift Supervisor — Molding Hall B	Aureus Composite S.R.L.	Long tenure. Practical view of what would actually change on the floor if our program lands.

Appendix — Notes & Photos

Note transcript summary

Notes were dictated in the car park (10 minutes, on exit), then extended with typed observations during the return drive to Târgoviște (approx. 55 minutes). Full cleaned transcript is stored in the trip's cloud folder as **session-001.txt**; raw untouched transcript is preserved as **session-001-raw.txt**. Aureus's Bucharest defense prime is redacted from the raw transcript on the visiting side's own choice, not by TripDeck.

Photos captured (referenced above)

- **photo-001.jpg** — Molding Hall B, view from north entry. Three of four presses running, tool-change on the fourth. Timestamped 10:47.
- **photo-002.jpg** — Tooling room, rear of Hall B. Both racking systems at capacity. Two shelves visibly tagged "awaiting rework — vendor dispute."
- **photo-003.jpg** — 5S markings at Bay 2 workstation. Wear pattern consistent with real long-term use, not recent repainting.
- **photo-004.jpg** — Incoming-goods area red/yellow/green pallet-tag system. Working, non-decorative.
- **photo-005.jpg** — Loading dock exterior. No visible CCTV coverage from ground level.

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