Where does your quote process get stuck?

Use one recent request for a 10-minute review. Tick a check when your team can show how it works. An empty box is a prompt to investigate.

- [ ] **Capture**
  A tracked request, received time and a named owner.
- [ ] **Validate**
  Missing quantities, units, references and delivery details are flagged.
- [ ] **Draft**
  Approved product and pricing sources; unclear matches go to review.
- [ ] **Approve**
  Staff review products, prices, availability, terms and the final quote.
- [ ] **Follow up**
  Open quotes have a next action; replies, acceptance and opt outs stop follow up.
- [ ] **Handoff**
  Accepted details reach the order process once, with clear exception ownership.

Record a baseline before changing the process

Requests per week

Staff minutes per request

Repeated entry steps

Priority handoff to investigate

Save a copy after filling, or print and complete by hand. PDF-reader support varies. Compare the same process before and after a pilot.

Book a 15-minute discovery call

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