Where does your quote process get stuck?

Use one recent request for a 10-minute review. Tick a check only when your team can show how it works. An empty box is a prompt to investigate, not proof that new software is needed.

- [ ] **01 / Capture**
  A tracked request, received time, and named owner.
- [ ] **02 / Validate**
  Missing quantities, units, references, and delivery details flagged before drafting.
- [ ] **03 / Draft**
  Approved product/pricing sources; unclear matches escalated.
- [ ] **04 / Approve**
  Staff review products, prices, availability, terms, and the final quote.
- [ ] **05 / Follow up**
  A next action for open quotes; stop rules for replies, acceptance, and opt-outs.
- [ ] **06 / Handoff**
  Accepted quote details reach the order process once, with visible status and exception ownership.

MEASURE THE SAME PROCESS BEFORE AND AFTER A PILOT

Requests / week

Staff min / request

Re-entry steps

Priority handoff to investigate

Save a copy after filling. PDF-reader support varies; you can also print and complete it by hand. Practical assessment aid, with no performance or savings guarantee.

Discuss your quote workflow.

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Independent personal brand / proposed service