Millions in quotes created. Most never followed up.

The pattern holds in every branch, on every counter.

Every branch quotes plenty of jobs. The problem is rarely the quoting itself.

It’s everything that happens after the price is given.

None of that is a technology problem. It's a process problem.

Where the quotes go missing

Four stages. Three points where deals quietly die.

Inquiry → QUOTED → FOLLOWED UP OR NOT → WON / LOST

LEAK 1
Details stay in the notebook, not the system.
Every quote needs to go into your ERP.

LEAK 2
People think the quote is the sale, this is only the start.

LEAK 3
If this is done too late, or ad-hoc, opportunities are missed and winning is sporadic.

FIVE PROCESS FIXES

QuoteTrack

Fix the process. Then bring in the system.

01

Capture it properly, first time

Every enquiry goes into the system in full. Customer, contact details, product, quantity, site or delivery requirements. Key question: when is this for? Informs the next step.

02

Price with a clear escalation path

By having a timeline, you can make a decision on pricing. Ensure there are protections/escalation paths on pricing decisions to protect margin.

03

Build a clear follow-up cadence & define responsibility.

Decide, as a branch, when a quote gets chased. Next day for urgent enquiries, 48 hours for standard quotes to pulse check initial price. Define the responsibility of follow up. (Counter Re, Sales Rep, Quote Creator, Quote Assignee)

04

Make the follow-up call count.

The purpose of this call is to pressure test price + availability, what needs to be done to win it. Often times, the quickest follow up wins because they're told the price it needs to be. Get there.

05

Log the outcome.

Crucial step, every data point makes you more competitive. Won deals = what are their upcoming projects? Lost = what was the reason?

READY WHEN YOU ARE

See what this looks like inside your branches.

QuoteTrack sits above your ERP, it doesn't replace it, it makes the quotes you're already creating impossible to forget. Get the process right first, using the fixes in this guide, and QuoteTrack is what makes it happen automatically, in every branch, without relying on one disciplined manager.

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