

Turn quote requests into qualified next steps

Quote requests stall when facts, ownership and the next decision are scattered across email, calls and notes.

ACCOUNTABLE OWNER

Sales lead or nominated quote owner

Five-step controlled trial

1. Choose a bounded sample

Use five recent, non-sensitive enquiries from one service type. De-identify customer information unless an approved tool and purpose applies.

2. Define the decision

Record service sought, stated timing, budget signal if stated, missing facts, owner, next action and review date. Unknown is valid.

3. Draft a qualification brief

Use AI to organise supplied facts and one useful clarification question. Do not invent scope, price, availability or need.

4. Review commercial claims

The quote owner checks the source and decides fit. Pricing, scope, terms and commitments remain human decisions.

5. Measure the handoff

Compare first useful response time, missing facts, qualified next actions, no-fit decisions and quote rework.

Use synthetic or de-identified information in an organisation-approved tool. Keep sends, approvals and system changes outside the trial until a person authorises them.

A practical test you can run

Starter prompt

Using only the enquiry and internal notes below, create a quote-request brief with service sought, stated timing, buyer role if explicit, missing information, qualification risk, next action, owner and review date. Draft one clarification question only if a critical fact is missing. Mark absent facts UNKNOWN. Do not invent pricing, availability, capability, terms or customer intent. Do not send a message or create a quote.

Synthetic worked example

Synthetic enquiry: 'We need help getting monthly reporting under control. Can you quote this week?' No team size or process is provided. Expected: preserve timing, mark scope inputs UNKNOWN and ask one question about the workflow.

Measure before and after

Time to first useful response; briefs with critical facts missing; qualified next actions; declined no-fit enquiries; quote rework. Keep enquiry volume separate from qualified opportunity.

Trial worksheet

Workflow / segment	
Owner and reviewer	
Baseline result	
Trial result	
Errors / exceptions	
Decision: stop, revise or expand	

Stop condition

Stop if personal data is placed in an unapproved tool, scope or price is inferred, a response is sent without review, or every enquiry is treated as a qualified sale.

Need a system around this workflow?

[Discuss a scoped workflow diagnostic with Agi360](#)

This guide prepares a controlled trial. A paid diagnostic, delivery scope, integrations and pricing are agreed separately.