

Where time goes

Proposal preparation at a service business

How one service business could prepare quotes with less copying and fewer calls for missing details.

Observations

Staff prepare about 18 proposals a month. A proposal currently takes about 35 minutes because job details, rates, and access notes must be checked in several places. Approximately one proposal in four requires another call before it can be completed.

What to change first

1. Change the process first. Use one note format for the job details, quantities, access date, and anything the customer needs to confirm. This needs no new software and should reduce missing information.
2. Keep the rates in one place. Have the estimator keep prices and expected labor hours up to date before using them to prepare quotes.
3. Prepare drafts from approved information. Set up a tool that uses the notes and current rates to prepare a draft. It highlights missing details for staff. A manager checks the prices and job details before sending.

18

Quotes each month

35 min

Preparation per quote

1 in 4

Needs another call

What could improve

Costs, responsibilities and checks

Possible time savings and costs

If the revised process reduces preparation by 20 minutes across 18 monthly proposals, it could save staff about six hours a month. Both versions still need a manager to review the quote. This estimate assumes that review takes the same amount of time. The first change takes about two hours of staff time to agree on the note format and requires no new software. Setting up the example drafting tool is estimated at 12 hours and \$25 to \$60 a month for third party software. These figures explain the example. They are estimates, not measured savings or Forwardspan prices.

Who does what

Staff capture the notes using the agreed format. A manager keeps the note format and rates current, checks the quote, and records the customer’s response. The customer confirms the access date and clears the work area.

Check the results

Compare the first drafts with the original notes. Check the quantities, prices, totals, and access details before staff start using the tool for more jobs. Once it is in use, review how long quotes take and what still needs correcting. Use those findings to choose the next improvement with the team.



The notes and the quote

Workshop lighting replacement

Job and site notes

Replace 12 existing ceiling fixtures and dispose of the old ones. A lift can reach the ceiling. The customer must confirm access and clear vehicles, materials and bench work. The estimator has approved an eight hour labor allowance for this example.

Draft quote for manager review

Ceiling fixtures	\$1,140.00
12 at \$95	
Installation labor	\$680.00
8 hours at \$85	
Fixture disposal	\$80.00
One charge	
Subtotal before tax	\$1,900.00

A manager checks the amounts and job details before anything is sent. The customer confirms the access date and clears the work area. These figures use the estimator’s approved allowance; they do not represent an autonomous estimate.

What keeps taking longer than it should?

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