Quotes

Use this to step you through the quote process

1. Respond to enquiry within 2 hours of receiving the inbound enquiry to say we will respond shortly

2. Review initial requirements to validate if project would be a good fit for our business and determine the level of risk involved in taking on the project

3. If good fit, quickly extract requirements in to the BUTDDA canvas to share with the team required to assist in the response

4. Once team is briefed, set project calendar up with PM to organise resourcing

5. Set-up project in : quotes.wp.com.au for the quote ID, which will become the Project ID

6. Set-up project client folder from template folders on FP. Ensure all documents reside in here. Only ever have the latest file version in the root folder of the quotes folders.

7. Set-up client within the Sales pipeline googlesheet

Make and Share Free Checklists
checkli.com