

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**