

FICTIONAL SAMPLE RESULT

QUOTATION PROCESS ASSESSMENT

From an Evolved Enquiry Process to a Sound Pilot Decision.

Illustrative assessment of a technical quotation process using 3-5 representative sample enquiries, four systems and a clearly scoped pilot.

WHAT THIS SAMPLE SHOWS

- Process and system map with clear handoffs
- Prioritised bottlenecks and transparent value assumptions
- Decision between process, rules, integration and AI
- Pilot scope with metrics, boundaries and cost range

Sample company: Muster GmbH, special-purpose machinery (entirely fictional)

DECISION AT A GLANCE

A pilot is appropriate - but only for one clearly scoped enquiry variant.

The sample shows how an evolved workflow can become a traceable investment decision.

RECOMMENDATION

Prepare a pilot for the conveyor-module product family: structure enquiries from email and PDF, flag missing information and provide relevant knowledge sources. Pricing, technical feasibility and approval remain with the specialist team.

40

Enquiries / month

Sample assumption

125 min

Processing time

per enquiry today

4

Systems / repositories

Outlook to CRM

23.3 hrs

Potential / month

Scenario, not a promise

STARTING POINT

Why Not Automate Immediately?

Mandatory information is inconsistent, approval practices vary and comparable quotations cannot be found reliably. These issues must be resolved before technical implementation.

PILOT READINESS

Why Run a Pilot Anyway?

Enquiry types recur, historical documents are accessible and an accountable specialist can review results. This makes a limited, measurable test possible.

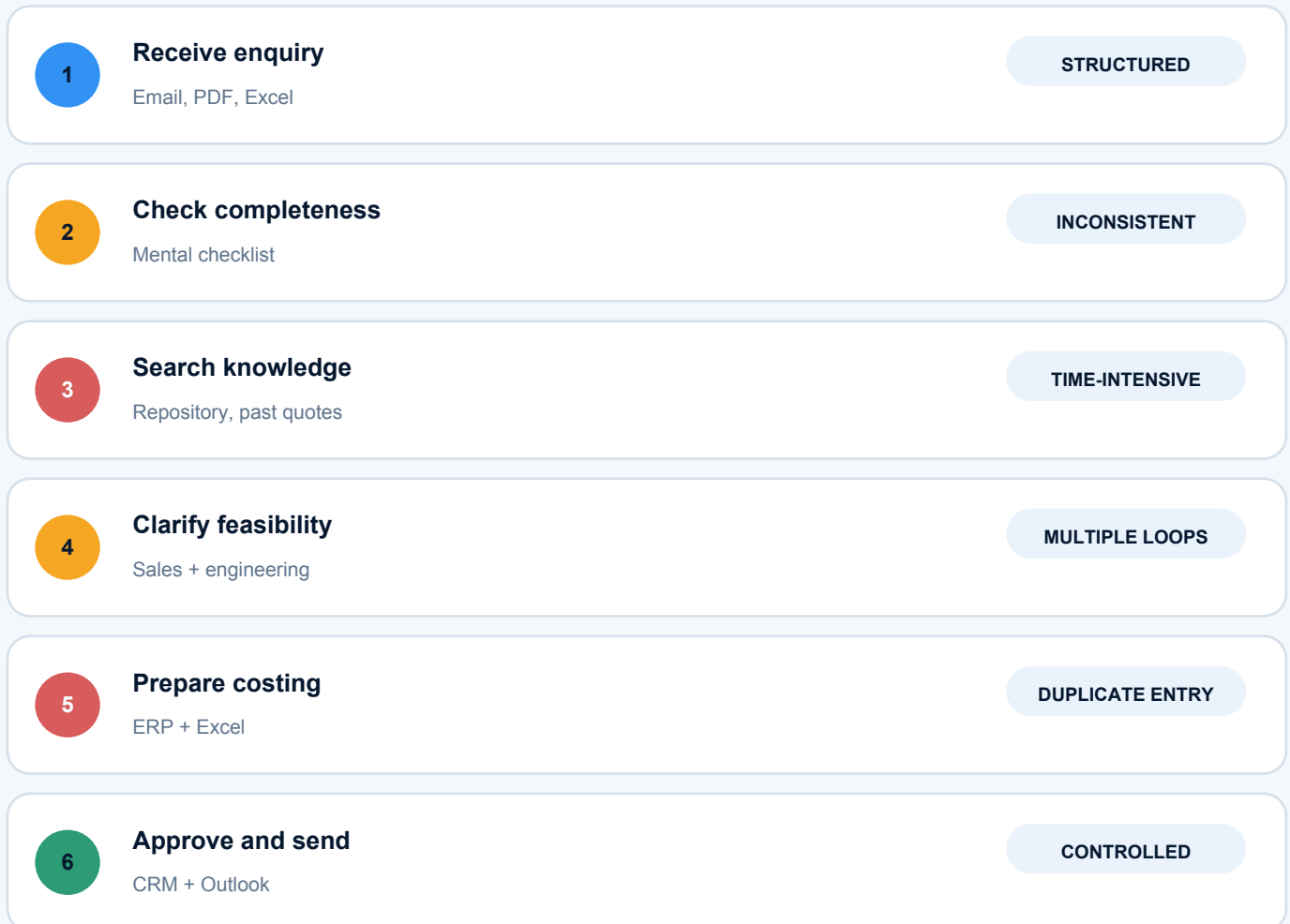
OUT OF SCOPE

No autonomous costing, no automatic customer response, no ERP write access and no binding statement on price or delivery time.

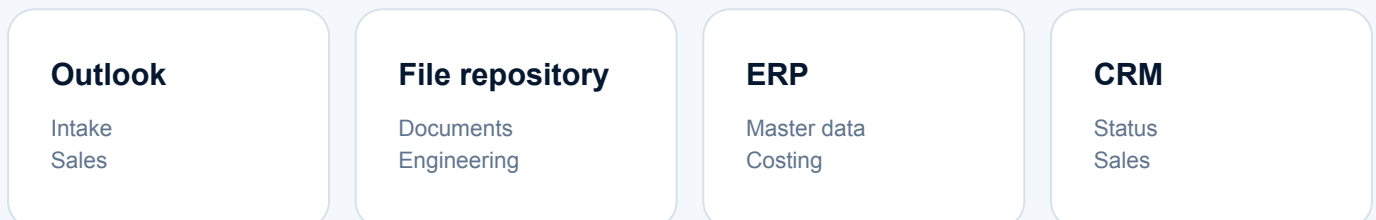
CURRENT STATE

The specialist work is under control, but information changes location too often.

The map separates process steps, systems and concrete sources of friction.



SYSTEMS AND OWNERSHIP



PRIORITIES

Three bottlenecks are relevant to the pilot - two should be solved organisationally.

The assessment considers not only time, but also risk, repeatability and technical dependency.

Bottleneck	Impact	Risk	Recommendation
Missing mandatory data	high	medium	Process + rules
Search for past quotes	high	medium	AI-assisted search
Duplicate data entry	medium	low	Integration
Inconsistent approval	high	high	Clarify process
Price and feasibility review	high	high	Human approval

ASSESSMENT LOGIC

01

Value

Time, cycle time, quality and fewer follow-up questions

02

Feasibility

Accessible data, repeatable rules and clear roles

03

Control

Source traceability, documented limits and specialist approval

PILOT DECISION

The pilot tests only enquiry structuring, gap detection and knowledge provision. Costing, price and technical commitments deliberately remain out of scope.

ECONOMIC ASSESSMENT

Potential is calculated as a scenario - not promised as an outcome.

All figures are fictional assumptions, not market benchmarks. In a real assessment they are established jointly and verified in the pilot.

40

Enquiries per month

Starting volume

125 min

Current processing

per case

90 min

Target scenario

not a promise

TIME PER ENQUIRY

Today

125 min

Pilot target

90 min

Reduction

35 min

WORKED EXAMPLE

 $40 \text{ enquiries} \times 35 \text{ minutes} / 60 = 23.3 \text{ hours per month}$

Sensitivity at the same time reduction: 20 / 40 / 60 enquiries yield 11.7 / 23.3 / 35.0 hours per month. These are capacity effects, not guaranteed financial returns or market benchmarks. The pilot measures them using representative cases.

Metric 1

Processing time from intake to a reviewable basis

Metric 2

Share of mandatory data and gaps detected correctly

Metric 3

Correction effort required from the specialist owner

TECHNOLOGY DECISION

The target state combines process, rules, integration and AI - with visible accountability.

Not every bottleneck is solved technically, and not every technical solution needs AI.

PROCESS**Standardise mandatory data**

One shared minimum data set applies to the selected enquiry variant.

RULES**Check gaps and ownership**

Explicit criteria are applied deterministically and traceably.

INTEGRATION**Connect status and master data**

CRM and ERP are initially considered read-only in the pilot.

AI ASSISTANCE**Structure documents**

Free text and PDFs are transferred into a reviewable schema with source references.

HUMAN APPROVAL**These Decisions Remain with the Specialist Team**

- technical feasibility and exceptions
- price, margin and commercial terms
- binding delivery time and customer communication

STOP

when a rule or source is missing

NEXT STEP

A limited pilot should make value and limitations measurable using real cases.

The following plan is illustrative and is not yet a binding implementation quotation.

PILOT GOAL

Within minutes, email and PDF inputs become a reviewable enquiry structure with sources, missing information and relevant knowledge references.

ILLUSTRATIVE TIMELINE - 8 WEEKS

WEEK 1-2**Prepare**

Define test cases, data and evaluation criteria

WEEK 3-5**Build**

Implement the enquiry pipeline, schema and source references

WEEK 6-7**Test**

Have the specialist team review representative cases

WEEK 8**Decide**

Document metrics, limits and the scaling path

SCOPE**Included in the Pilot**

Enquiry import from one channel
Structuring for one product family
Source and gap indicators
Review interface for the specialist team
Measurement using agreed test cases

BOUNDARY**Deliberately Excluded**

Autonomous quotation generation
Binding costing
ERP write access
24/7 production operation
Expansion to further product families

NON-BINDING RANGE IN THIS SAMPLE

EUR 28,800-43,200 net

Calculation basis: 240-360 project hours x EUR 120/hour. Actual effort depends on data access, interfaces, security requirements and evaluation scope.

DECISION: PREPARE PILOT QUOTATION