



DRIVING EFFECTIVE QUOTE MANAGEMENT

Keys to a Successful Process

SET THE EXPECTATION OF TIME



Clearly define timing of activities

Determine the time required to not only develop a quote, but the expectation for timely customer feedback. This can vary based on complexity of the proposal so a tiered structure can be used based on the inputs required.

METRICS SHOULD MATCH BEHAVIOR



The data should mirror desired activity

Put in place measures that will monitor movement toward set sales goals to identify progress, or indicate trends which require countermeasures to get back on track.

DESIGN A CLEAN DASHBOARD



Present the data in an organized layout

When creating a dashboard include only the data relevant to the view and use graphics that accurately represent the information in the most useful way.

GET STARTED WITH A BASIC TEMPLATE



([CLICK HERE](#))

Try our free starter template!

Starting out with a basic template can act as a jumping off point to establishing a more tailored solution around.

Looking for a more customized solution?

[Contact us](#) today to discuss how to best meet your needs.

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