

Transition Quoting* Process:

Prework: Determine employees who are taking over the quoting process (referred to in this document as quote employees) and set a recurring 60-minute meeting for the next 12 weeks starting the week of MM/DD/YY.

Week	Activity	Time allotted
1	Meet with quote employees to identify the 5 types of scenarios they will quote. Review current templates in <Quoting product>. Delete any that do not apply to current business. Note any missing templates to be created in later meetings	1 hour
2	SME documents the 3 of the 5 scenarios - see recommended process below	1 hour
3	SME documents the remaining 2 scenarios - see recommended process below	1 hour
4	Quote Creation Meeting: Quote employees create a quote for the first 3 types of opportunities in the pipeline by the instructions ONLY. Send quotes to customers. Create templates for any missing scenarios	1 hour
5	Second Quote Creation Meeting: Remaining 2 types of opportunities the pipeline by the instructions ONLY. Send quotes to customers. Create templates for any missing scenarios	1 hour
6	Quote Review Meeting: SME meets with employees to review quotes they have completed since last meeting. Send a minimum of 90% of the quotes before the meeting ends.	1 hour
7	Quote Review Meeting: SME meets with employees to review quotes they have completed since last meeting. Send a minimum of 90% of the quotes at the end of the meeting	1 hour
8-12	Employees produce 80% of the quotes and send them immediately. Questions/concerns are brought to the weekly quote meeting.	1 hour /week
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Recommended Method for Documenting Quoting:

- SME schedules a Teams (or zoom) meeting with themselves to record and transcribe it
- Share your screen and talk through the process of each of the 5 major quotes
- Use the transcription to build a step by step of the process
 - Using AI (CoPilot) can get a great start by simply stating "Step 1, Step 2" as SME records.
- Take note of the access needed to any software solutions so the access can be provided before meeting with the quoting employees.

**This chart can be adapted for documenting and delegating other processes as well.*

first
things
first
Training and Consulting