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Business report

Northline Services

Your team receives quote requests by email, then copies the details into a shared sheet. The owner checks that sheet to decide who needs a follow-up. Start by giving every request an owner and a next action before adding automatic customer messages.

The recommended first improvement

Give every quote request a clear next step

The handoff between receiving a request and following up is the part nobody owns consistently. Making that handoff visible is a useful first improvement. Automatic quoting should wait until pricing rules are documented.

Inside your report

Illustrative example. This business and its interview details are fictional. This is not a client result.

Prepared automatically from the interview and research.

01 An assigned next step for every request

Approach Connect your tools

Requests and their next actions are recorded separately. A person must reconstruct the current position before following up.

First agree the fields and responsibilities for a request. Then assess an email-to-tracker integration that prepares a record and flags missing information. Keep customer messages and quote prices under human approval. This is a proposed design; compatibility with the current accounts still needs checking.

Proposed workflow

1. Receive a quote enquiry in the agreed mailbox.
   Automatic
2. Prepare a tracker entry with the request details and source link.
   Automatic
3. Check missing details, assign an owner, and approve the next action.
   Your team
4. Flag requests with no owner or an overdue next action.
   Check / exception

Potential impact

The intended benefit is clearer ownership and less time reconstructing follow-ups. Cash savings and additional sales cannot be estimated from the interview.

Ongoing software costs

Not estimated. More information is needed.

Limits and exceptions

Email threads may contain several requests or incomplete details.

An assigned follow-up does not guarantee a sale.

Access, privacy requirements, and integration support need review before implementation.

Implementation brief

Proposed scope

- One intake mailbox and one agreed tracker.
- Draft records, duplicate checks, owner assignment, and an overdue review list.
- Test normal requests, duplicates, missing information, and disconnected accounts.

Your involvement

- Provide representative requests and identify a process owner.
- Approve record fields and test the workflow before launch.

Dependencies

- Confirm access and integration support for the existing tools.
- Agree the review process and ongoing software costs.

A useful place to start

1. Walk through a recent request from arrival to follow-up.
2. Record an owner, status, next action, and due date for the next ten requests.
3. Measure the time spent checking the tracker and the number of unassigned requests.

How to check the result

Compare unassigned requests, response time, and time spent on the daily review before and after the pilot. Agree targets after collecting the baseline.

What we heard

Requests arrive by email

In this fictional interview, the owner described a team of six receiving about 20 quote requests each week. Details are copied into a shared sheet.

Follow-ups depend on a manual check

The owner checks the sheet each afternoon. Response times and lost opportunities have not been measured.

Evidence

- Interview scenario: six team members and about 20 quote requests per week.
- The owner described email intake, a shared tracker, and a daily manual check.

Assumptions to confirm

- There is a consistent definition of a quote request.
- The team is willing to maintain an owner and next-action date.

What still needs checking

- Which email and tracker plans are in use, and what integrations they permit.
- How often requests are duplicated, missed, or delayed.
- Whether the existing software already supports assignment and reminders.

Other credible options

- Use assignment and reminders in the existing software if available.
- Start with a shared tracker and a manual daily review if request volume does not justify an integration.

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Your next step

Use the next ten requests to check whether clear ownership alone solves the problem. If manual copying remains material, assess the integration with those examples.

Want help implementing this?

We can review the recommended workflow with you, confirm the requirements, and prepare a scoped proposal.

Discuss this recommendation

cal.com/thea-labs/ai-discovery-call

Implementation is optional. Project pricing follows discovery.