neoflux

PROCESS REVIEW REPORT (SAMPLE)

Process Review

From quote request to quote sent: where the time goes, and what to do about it

CLIENT

Sandline Industrial Supply

PROCESS

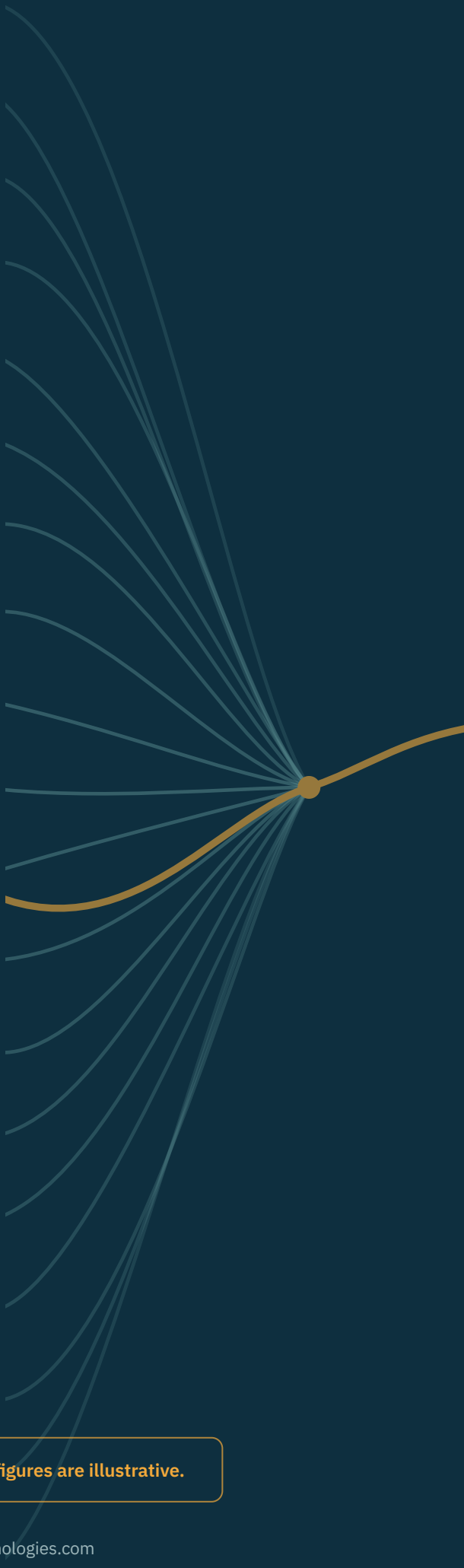
Request for quotation (RFQ) to quote sent

AUDIENCE

Prepared for the Head of Sales and the Managing Director

STATUS

Final report, after two comment rounds



Sample report. Sandline Industrial Supply is a fictional company and all figures are illustrative.

Neoflux Technologies LLP Sample edition, November 2026 neofluxtechnologies.com

About this sample

This is a sample of the report you receive at the end of a Process Review. The company in it, Sandline Industrial Supply, is fictional. Every figure is illustrative: chosen to show the method and the depth of the work, not a result we have delivered for a client.

Your report follows the same structure, built from your process, your people and your data. Where your data is thin, the report says so and shows the assumption it used instead, as this one does.

The scenario: a B2B distributor of industrial parts with offices in the UAE and India receives around 620 quote requests a month by email and WhatsApp. Customers complain that quotes are slow. Leadership asked one question: where does the time go, and what should we automate, keep with people, or leave alone?

How to read this report

5 minutes
Executive summary

20 minutes
Add the findings, the options compared and the business case

For the build team
Recommendations, roadmap, data and privacy, risks and measures

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01 Executive summary

Sandline spends about 765 staff hours a month producing quotes, and a typical quote reaches the customer after 2.6 working days. The work itself takes 74 minutes per quote; the rest of the time the quote is waiting. Quotes sent within one working day are won almost twice as often as later ones.

Median quote turnaround	Staff time per quote	Staff hours on quoting	Win rate, quoted within 1 day
2.6 days	**74 min**	**765 / month**	**31% vs 17%**
working days; target under 1	across 5 roles; target 24	about 517 can be freed	vs quotes sent later

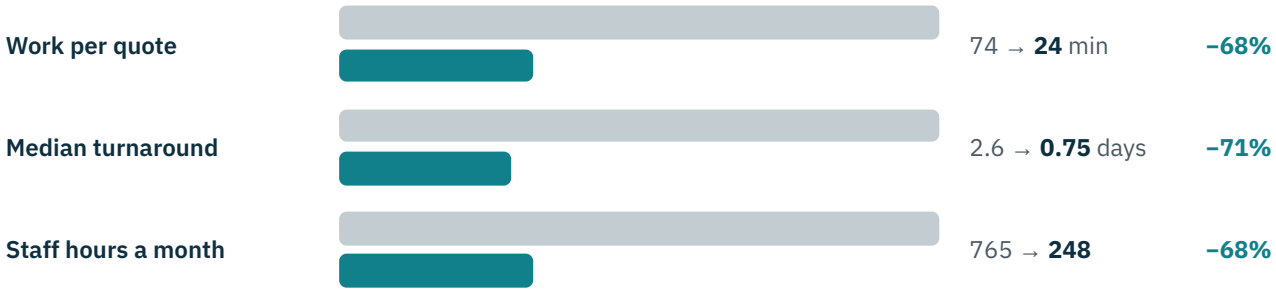
What we found

1. Waiting, not working, is the problem: 2.6 days of waiting against 74 minutes of work. Clarifying specifications by email (0.8 days) and checking stock twice (0.7 days) are the two biggest waits.
2. Matching customer descriptions to the right part depends on two engineers' memory. When either is away, turnaround roughly doubles.
3. Every quote goes to a manager for margin approval, and 83% come back unchanged.

What we recommend

1. Start with four quick wins in weeks 1 to 5 (automatic intake, generated quote drafts, approval by margin band, follow-up reminders); together about 5 weeks.
2. Then a private AI matcher, hosted inside Sandline's own environment, that suggests the three most likely parts for each request line. An engineer confirms every match.
3. Keep negotiation, custom-engineered specifications and pricing exceptions with people.

Today and after the recommended changes



DECISION REQUESTED

Approve Option B (full recommendation, 12 weeks). In the base case faster quotes add about USD 9,200 a month in gross margin, and about 517 staff hours a month are freed for account work.

02 Scope, method and evidence

We reviewed one process end to end, with the people who run it, over 20 working days. Nothing was built and no system was changed; all access was read-only.

PROCESS
Quote request received → quote sent → first follow-up

OFFICES
UAE and India

SYSTEMS
Shared inbox and WhatsApp Business, ERP (read-only), CRM (read-only)

DATA PERIOD
90 days of quotes, plus a 2-week time log

DURATION
20 working days, two comment rounds

Who we spoke to (6 sessions)

ROLE	FORMAT	WHAT WE COVERED
Head of Sales	Workshop, 90 min	Goals, pricing policy, what “good” looks like
Sales coordinators (2)	Shadowing, 2 half-days	Intake, quote building, sending
Sales engineers (2)	Interview, 60 min	Item matching, clarifications
Purchasing lead	Interview, 60 min	Stock, supplier lead times
Sales manager	Interview, 45 min	Approvals and exceptions
IT manager	Interview, 45 min	Systems, access, data rules

Evidence base

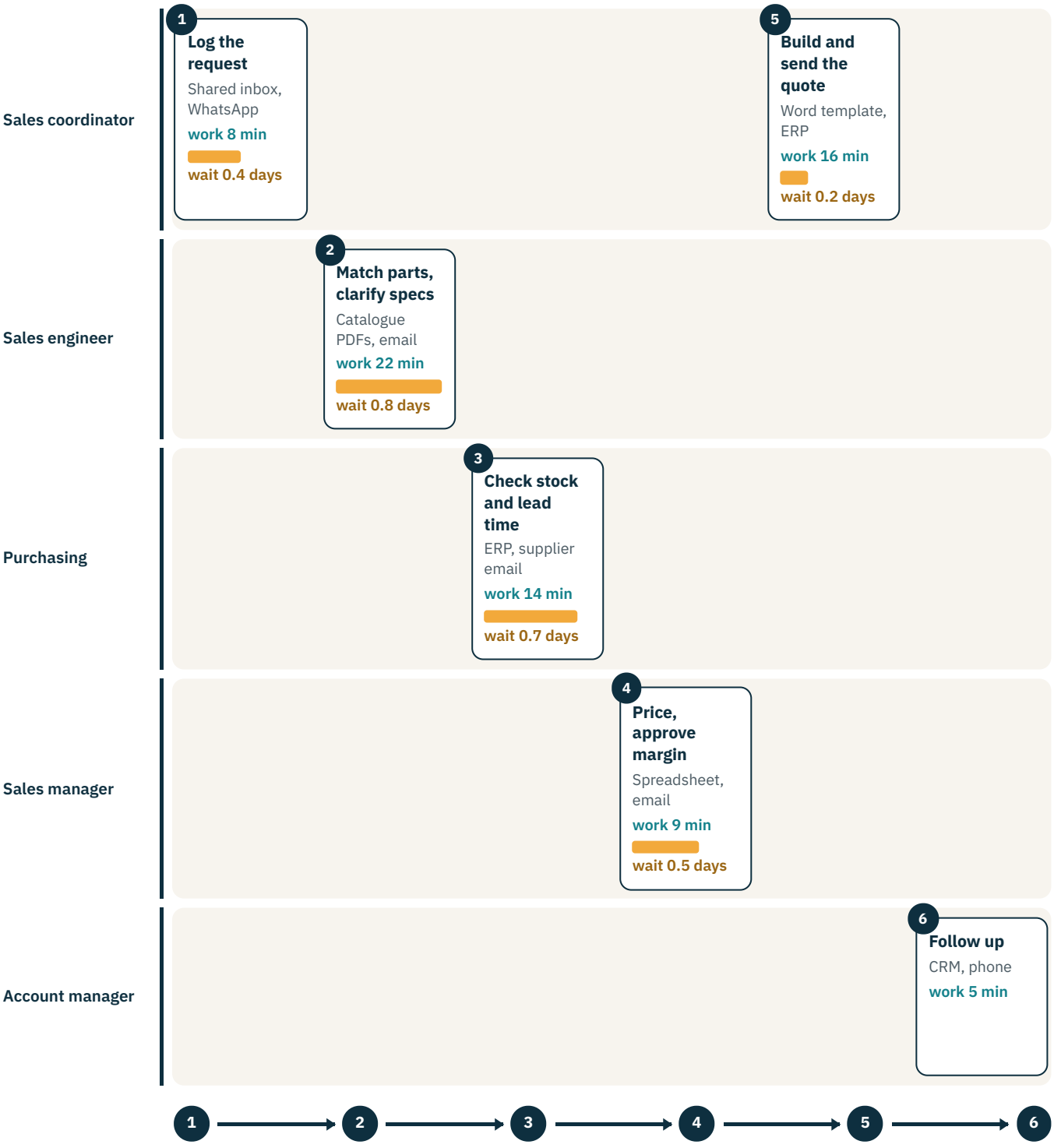
- 400 quotes from the CRM (90 days): timestamps, revisions and outcomes
- A 2-week time log kept by 6 staff (touch time per step)
- ERP item master (8,900 parts) and 14 catalogue PDFs
- 120 approval email threads, sampled at random

Out of scope

- Building or changing any system
- Pricing strategy and discount levels
- Order fulfilment and invoicing
- Supplier negotiations

03 The process today

Six steps across five roles and five tools. Each box shows hands-on time per quote; the amber bar between steps shows how long the quote waits before the next person picks it up.



A Requests arrive in three channels (shared inbox, WhatsApp, a web form) and are retyped into the CRM.

B One in three requests needs at least one clarification email; the average is 2.3 rounds.

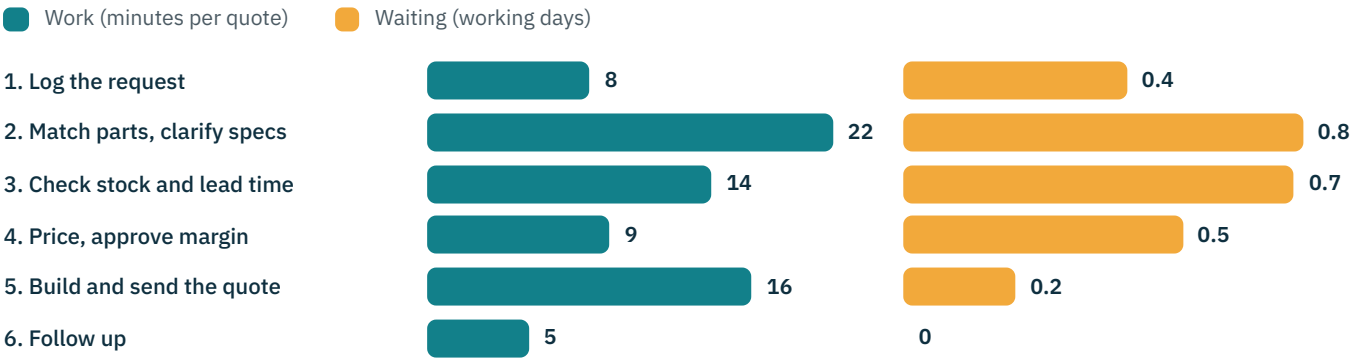
C The quote goes back to the coordinator twice: to log it and to send it.

04 Time and cost baseline

Touch time comes from the 2-week time log; volume and waiting time from 400 CRM records. Cost uses a blended, fully loaded staff cost of USD 18 an hour, agreed with Finance.

STEP	ROLE	WORK PER QUOTE	WAITING	HOURS / MONTH	COST / MONTH
1. Log the request	Sales coordinator	8 min	0.4 days	83	USD 1,488
2. Match parts, clarify specs	Sales engineer	22 min	0.8 days	227	USD 4,092
3. Check stock and lead time	Purchasing	14 min	0.7 days	145	USD 2,604
4. Price, approve margin	Sales manager	9 min	0.5 days	93	USD 1,674
5. Build and send the quote	Sales coordinator	16 min	0.2 days	165	USD 2,976
6. Follow up	Account manager	5 min	0 days	52	USD 930
Total		**74 min**	**2.6 days**	**765**	**USD 13,764**

Work versus waiting, per step



- Hours per month = 620 quotes × minutes per quote ÷ 60.
- Waiting is the median time a quote sits between one step finishing and the next starting.
- Annualised, quoting costs about USD 165,000 of staff time.

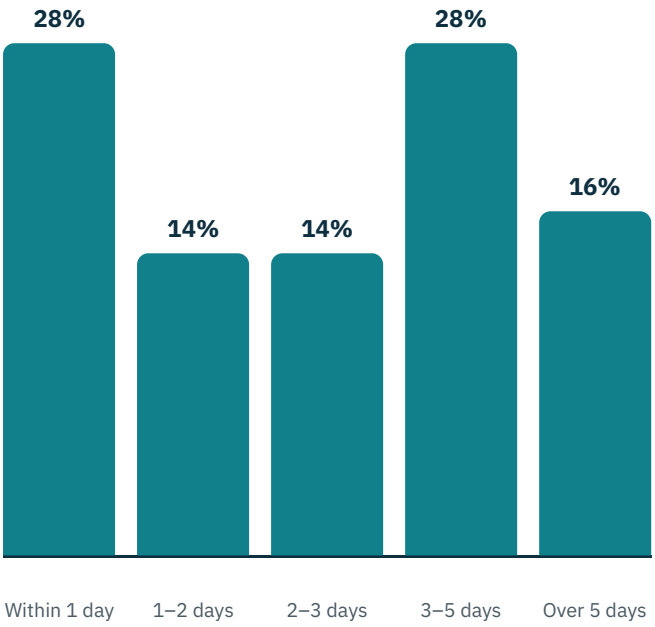
REWORK NOT INCLUDED ABOVE

Quotes revised after sending about 87 a month	**14%**
Time per revision about 36 hours a month	**25 min**
Most common cause	**Wrong part code or price copied by hand**

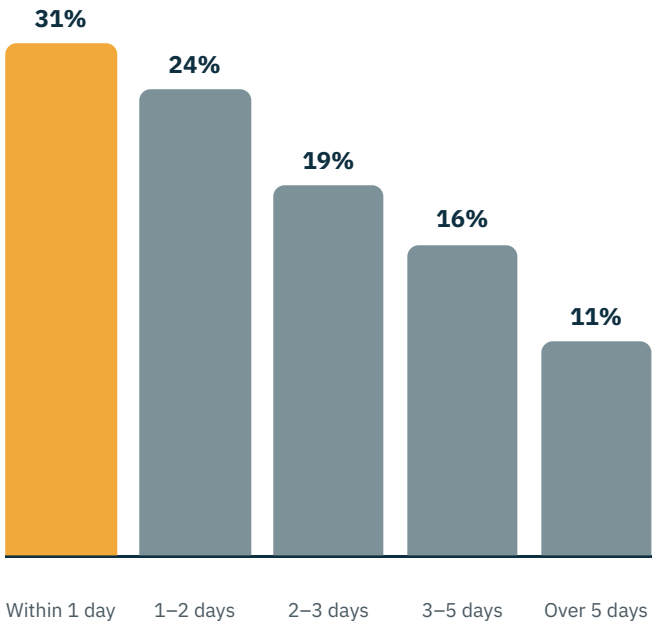
05 Speed wins orders

We grouped the 400 quotes by how long they took to reach the customer, then checked how many became orders. The pattern is steady: every extra day costs win rate.

Share of quotes by turnaround



Win rate by turnaround



Source: 400 quotes, 90 days, CRM outcome field. Overall win rate 20.9%.

What this means

1. Only 28% of quotes go out within one working day. Those win 31% of the time; quotes sent later win 17%.
2. Part of the gap is not speed: simple requests are both faster and easier to win. We therefore count only half of the gap in the base case of the business case.
3. The slowest 16% of quotes (over 5 days) are mostly custom specifications. They should stay with engineers; the target is the routine majority.

06 Findings

Five findings, ranked by their effect on turnaround. Each one shows the evidence, the root cause and what it costs today.

F1 Specifications are clarified by email, one question at a time

Severity: High

EVIDENCE

38% of requests needed at least one clarification; 2.3 email rounds on average; 0.8 days of waiting.

ROOT CAUSE

No list of required details per product family, so gaps are found one by one.

IMPACT TODAY

The largest single wait, and 227 engineer hours a month.

F2 Part matching depends on two people’s memory

Severity: High

EVIDENCE

2 of 5 engineers handled 61% of non-standard matches. The catalogue is spread over 14 PDFs and the ERP.

ROOT CAUSE

No searchable link between how customers describe a part and the part code.

IMPACT TODAY

Key-person risk: in the one week both were away, median turnaround rose to 5.1 days.

F3 Stock and lead time are checked twice

Severity: Medium

EVIDENCE

Purchasing re-checked 44% of lines the engineer had already checked.

ROOT CAUSE

The ERP stock screen shows neither incoming supply nor supplier lead time.

IMPACT TODAY

145 hours a month and 0.7 days of waiting.

F4 Every quote waits for margin approval

Severity: Medium

EVIDENCE

100% of quotes go to a manager; 83% come back unchanged; median wait 0.5 days.

ROOT CAUSE

The policy was set when volume was about a third of today's.

IMPACT TODAY

93 manager hours a month; quotes wait overnight.

F5 Quotes are rebuilt by hand

Severity: Medium

EVIDENCE

16 minutes per quote to copy ERP lines into a Word template; 14% revised after sending.

ROOT CAUSE

No link between the ERP and the quote template.

IMPACT TODAY

165 hours a month, and errors that reach customers.

Findings at a glance

	FINDING	SEVERITY	STAFF HOURS A MONTH	WAITING IT CAUSES
F1	Specifications are clarified by email, one question at a time	High	227	0.8 days
F2	Part matching depends on two people's memory	High	(within the 227 above)	Up to 2.5 extra days when key people are away
F3	Stock and lead time are checked twice	Medium	145	0.7 days
F4	Every quote waits for margin approval	Medium	93	0.5 days
F5	Quotes are rebuilt by hand	Medium	165 + 36 rework	0.2 days

WHAT IS WORKING, AND SHOULD BE KEPT

- Customers interviewed by the sales team value the personal follow-up call. It stays human.
- The CRM outcome field is filled in consistently, which made the win-rate analysis possible.
- Purchasing's supplier relationships solve hard requests that no system would.

07 Options compared, step by step

For each step we compared three ways forward: rule-based automation, private AI, or keeping it with people. The verdict is the simplest option that removes the wait.

STEP	AUTOMATE	PRIVATE AI	KEEP WITH PEOPLE	VERDICT
1. Log the request	Capture email, WhatsApp and form requests into the CRM with a reference	Extract customer, items and quantities	Coordinator handles exceptions	Automate
2. Match parts, clarify specs	Required-details checklist per product family	Suggest the top 3 parts from the catalogue and past quotes	Engineer confirms; custom specs stay with engineers	Private AI
3. Check stock and lead time	One view: stock, incoming supply, supplier lead time	Not needed	Purchasing handles non-stock items only	Automate
4. Price, approve margin	Auto-approve inside the margin band	Not needed	Manager approves exceptions (about 25%)	Mixed
5. Build and send the quote	Draft generated from ERP lines, English or Arabic	Draft the cover note	Coordinator reviews and sends	Automate
6. Follow up	Reminders on day 2 and day 5	Not needed	The call stays with the account manager	Mixed

DELIBERATELY KEPT WITH PEOPLE

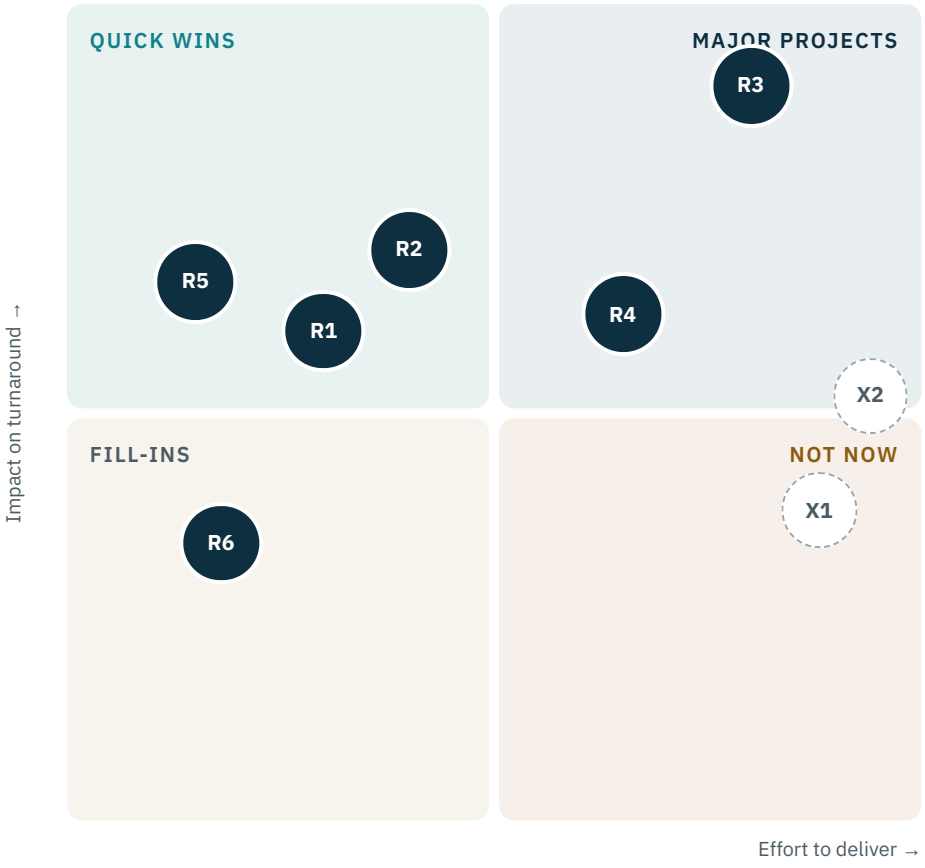
- **Negotiation and relationship calls**
- **Custom-engineered specifications**
- **Pricing exceptions and strategic accounts**

Why not use AI for every step?

1. Three of the six steps need no AI at all: a rule or a better screen removes the wait for less money and less risk.
2. AI is used only where the input is messy human language (customer descriptions of parts), which rules cannot handle well.
3. Every AI output is a suggestion a person confirms, so a wrong match costs seconds, not a wrong quote.

08 Where to start: impact against effort

Eight candidate changes, placed by expected effect on turnaround and the effort to deliver them. Two were considered and are not recommended now.



R1 Automatic intake
R2 Generated quote drafts
R3 Private AI part matching
R4 Stock and lead-time view
R5 Approval by margin band
R6 Follow-up reminders
X1 Customer self-service portal
X2 Replace the ERP quoting module

How to read it

- R5 is a policy change with almost no build: do it in week 1.
- R3 carries the most value and the most effort, so it is piloted with two engineers before roll-out.
- X1 and X2 cost more than they return at today's volume. Revisit at twice the volume.

09 The process after the changes

The same six steps and the same people. What changes is the waiting between them and the copying inside them.

Work per quote	Median turnaround	Staff hours a month	Quotes revised after sending
74 → 24 min	**2.6 → 0.75 days**	**765 → 248**	**14% → 5% target**

Today After

STEP	HOW IT WORKS AFTER	WORK	WAITING
1. Log the request	Captured into the CRM automatically; coordinator checks exceptions	8 2 min	0.4 0.05 days
2. Match parts, clarify specs	Private AI suggests the top 3 parts; engineer confirms; checklist asks missing fields once	22 9 min	0.8 0.3 days
3. Check stock and lead time	One view of stock, incoming supply and supplier lead time	14 3 min	0.7 0.1 days
4. Price, approve margin	Auto-approved inside the margin band; about 25% go to the manager	9 4 min	0.5 0.2 days
5. Build and send the quote	Draft generated from ERP lines in English or Arabic; coordinator reviews and sends	16 4 min	0.2 0.1 days
6. Follow up	Reminders on day 2 and day 5; the call stays with the account manager	5 2 min	0 0 days

10 Recommendations

Six recommendations in three phases, each with an owner at Sandline. Scope and price for any build are agreed in writing before work starts.

R1 Automatic intake into the CRM

Phase 1

What. Email, WhatsApp Business and web-form requests create a CRM record with a reference number and the attachments.

Why. Removes retyping and the 0.4-day wait before work starts.

EFFORT
2 weeks

OWNER AT SANDLINE
Sales coordinator lead

DEPENDS ON
CRM API access

R2 Quote drafts generated from the ERP

Phase 1

What. Confirmed lines become a branded quote in English or Arabic, ready to review and send.

Why. Cuts 16 minutes to about 4 and removes copying errors behind most revisions.

EFFORT
3 weeks

OWNER AT SANDLINE
Head of Sales

DEPENDS ON
ERP read access

R3 Private AI part matching

Phase 2

What. A model hosted inside Sandline's environment suggests the three most likely parts for each request line, with the reason. The engineer confirms or corrects; corrections improve it.

Why. Removes the dependence on two people and the largest single wait.

EFFORT
6 weeks incl. pilot

OWNER AT SANDLINE
Lead sales engineer

DEPENDS ON
Item master, 12 months of quotes

R4 One view of stock and lead time

Phase 3

What. Stock, incoming supply and supplier lead times on one screen for engineers and Purchasing.

Why. Ends the double check: 0.7 days and 145 hours a month.

EFFORT
4 weeks

OWNER AT SANDLINE
Purchasing lead

DEPENDS ON
Supplier lead-time table (Purchasing)

R5 Approval by margin band

Phase 1

What. Quotes inside an agreed margin band and value limit go out without approval; the rest go to the manager.

Why. 83% of approvals change nothing today.

EFFORT
1 week

OWNER AT SANDLINE
Sales manager, Finance

DEPENDS ON
Band agreed by Finance

R6 Follow-up reminders

Phase 1

What. The CRM reminds the account manager on day 2 and day 5 after sending.

Why. Keeps the personal call, removes forgotten follow-ups.

EFFORT
1 week

OWNER AT SANDLINE
Account managers

DEPENDS ON
R1

Delivery summary

	RECOMMENDATION	PHASE	EFFORT
R1	Automatic intake into the CRM	1	2 weeks
R2	Quote drafts generated from the ERP	1	3 weeks
R3	Private AI part matching	2	6 weeks incl. pilot
R4	One view of stock and lead time	3	4 weeks
R5	Approval by margin band	1	1 week
R6	Follow-up reminders	1	1 week

11 Business case

The benefit is counted on extra gross margin from faster quotes only. Freed staff time is shown separately, because it becomes money only if the time is used for something else.

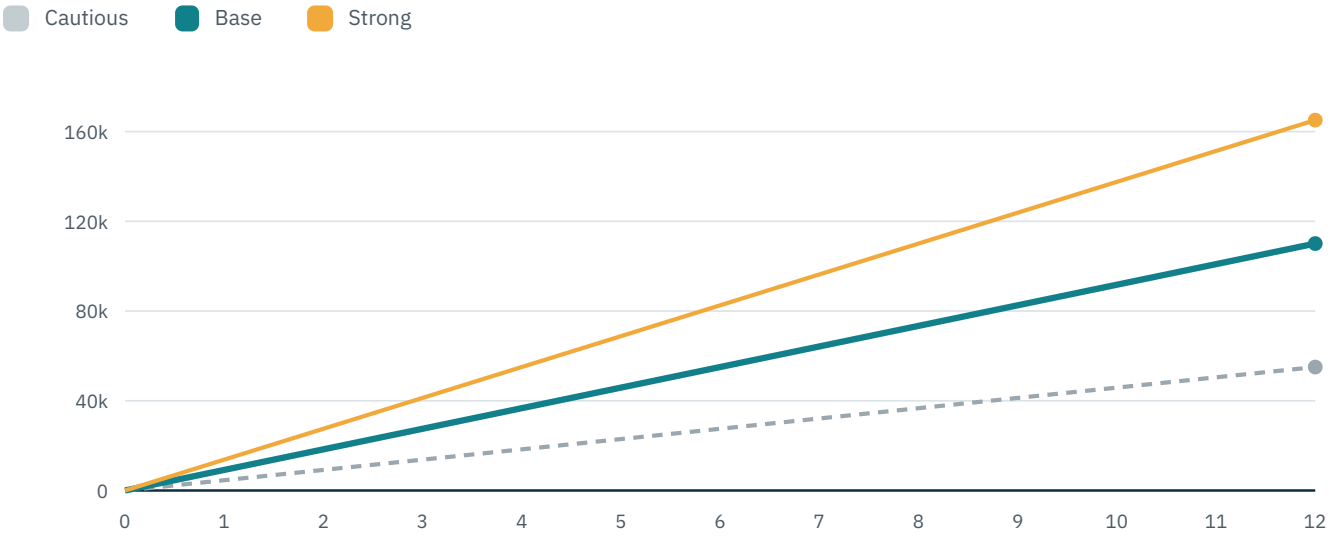
INPUTS

Quotes per month	Average order value	Gross margin	Quotes within 1 day	Win-rate gap (1 day vs later)
620	**USD 2,800**	**18%**	**28% → 70%**	**14 points**

Three scenarios

	CAUTIOUS	BASE	STRONG
Share of win-rate gap realised	25%	**50%**	75%
Extra orders a month	9.1	**18.2**	27.3
Extra gross margin a month	**USD 4,586**	**USD 9,173**	**USD 13,759**
Extra gross margin over 12 months	**USD 55,032**	**USD 110,076**	**USD 165,108**

Cumulative extra gross margin, months 0–12 (USD)



NOT COUNTED ABOVE: STAFF TIME FREED

About 517 hours a month, the equivalent of 3.2 full-time roles, worth about USD 9,300 a month at USD 18 an hour. Sandline plans to use it for proactive account calls, not headcount reduction.

- In the real report, this page also sets the benefit against the agreed build cost to show payback.
- Extra orders = 260 more quotes a month within 1 day × 14-point gap × share realised.

12 Build, buy or configure

Before recommending a build we compared it with the alternatives Sandline already has or could buy.

Configure the ERP's quoting module

TIME
8–12 weeks

FIT
Templates and stock; no part matching; no WhatsApp intake

MAIN RISK
Vendor roadmap

Subscribe to a quoting (CPQ) tool

TIME
6–10 weeks

FIT
Strong pricing rules; generic matching; data leaves Sandline

MAIN RISK
Data location, lock-in

Custom layer on existing systems

TIME
12 weeks

FIT
Fits the catalogue and Arabic requests; data stays inside

MAIN RISK
Sandline owns upkeep; mitigated by hand-over

Policy changes only

TIME
2 weeks

FIT
Turnaround to about 2.0 days

MAIN RISK
Matching risk unchanged

HOW THE OPTIONS WERE SCORED (1 TO 5)

1. Effect on the two largest waits: part matching and stock checks
2. Total cost over three years, including subscriptions and upkeep
3. Where customer data and prices are stored
4. Arabic and English requests, including WhatsApp
5. Time to first measurable result

OUR VIEW

The custom layer is recommended because part matching is the largest wait and no packaged option handles it well for this catalogue. If the ERP vendor confirms matching on its roadmap within six months, Option 1 becomes the better path for R2 and R4, and we would say so.

13 Data, privacy and security

Quotes contain customer details, prices and margins. The design keeps all of it inside Sandline's environment.

DATA	EXAMPLE	WHERE IT LIVES	RULE
Customer requests	Names, emails, drawings	Inbox, WhatsApp, CRM	Read by the model inside Sandline's environment; never sent outside
Prices and margins	Cost, list price, band	ERP, pricing sheet	Never sent to an external AI service
Catalogue and past quotes	8,900 parts, 12 months of quotes	ERP, PDFs	Used to build the matching index, inside
Supplier lead times	Days by supplier and part family	New table	Owned and updated by Purchasing



Where the private model can run

OPTION	FITS WHEN
Sandline's existing cloud account (recommended)	IT already manages the account and its security policies
A server in Sandline's office or data centre	Policy requires data to stay on premises
A private instance managed for Sandline	IT prefers not to run it, and the contract keeps data in-region

Controls built in

Private AI
The model runs on Sandline's own cloud account or server. No customer data is used to train a third-party model.

People approve
Every match is confirmed by an engineer and every quote is sent by a person.

Access by role
Uses the existing CRM and ERP permissions; no new shared logins.

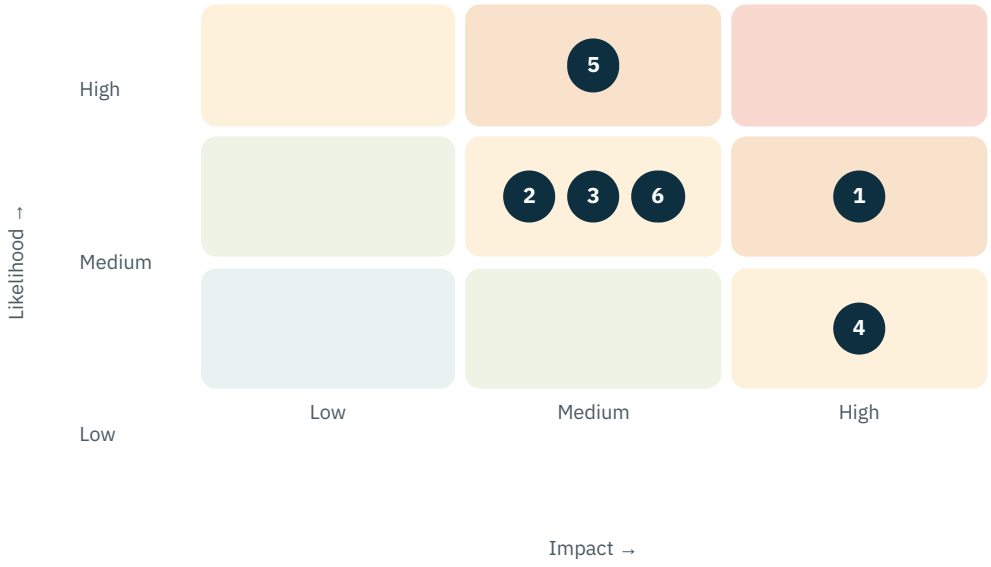
Audit trail
Each suggestion, correction and approval is logged with user and time.

14 Risks and how we handle them

The risks that could stop the benefits arriving, with an owner for each.

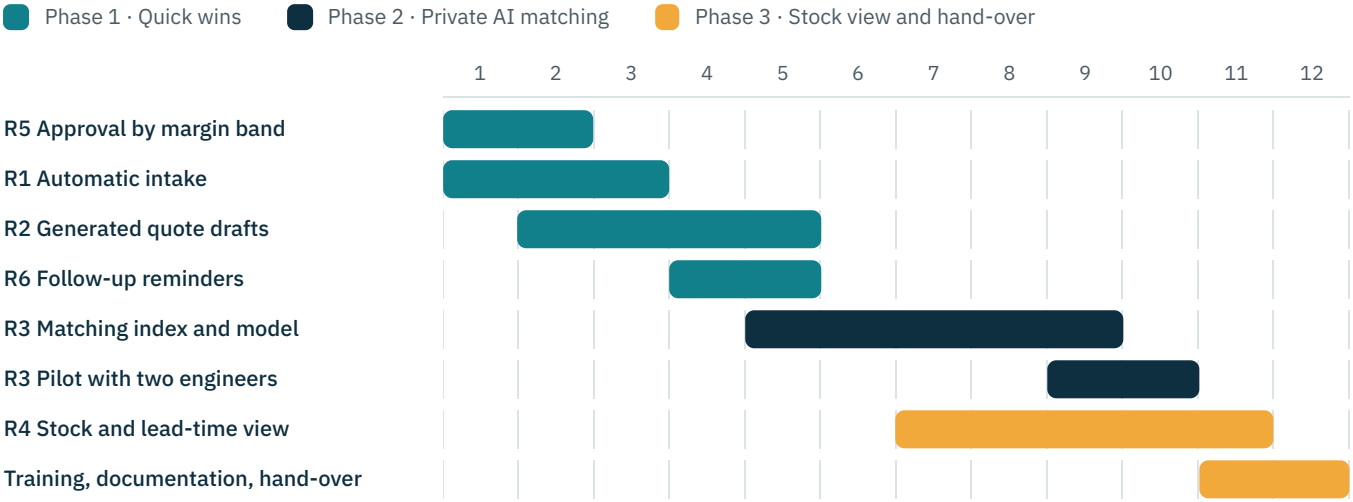
RISK	LIKELIHOOD	IMPACT	MITIGATION	OWNER
1 **Matching accuracy too low on rare parts**	Medium	High	Pilot with go/no-go at 85% top-3 accuracy; rare parts stay manual	Neoflux
2 **Engineers do not trust suggestions**	Medium	Medium	Show the reason with each match; engineers shape the pilot	Lead engineer
3 **ERP access slower than planned**	Medium	Medium	Read-only access requested in week 1; date moves if late	IT manager
4 **Margin band set too wide**	Low	High	Start narrow; review exceptions monthly with Finance	Finance
5 **Lead-time table goes stale**	High	Medium	Monthly owner check; flag entries older than 60 days	Purchasing
6 **Faster quotes, same win rate**	Medium	Medium	Business case counts half the gap; review at 90 days	Head of Sales

Risk map: likelihood against impact



15 12-week roadmap

Quick wins first, so the effect is measurable before the larger build. Each phase ends with a decision.



Week 1–12

Decision points

Week 5
Quick wins live; turnaround measured against the baseline

Week 10
Pilot review: roll out only at 85% top-3 accuracy or better

Week 12
Hand-over; 90-day review booked

Who does what

ACTIVITY	SANDLINE SALES	SANDLINE IT	NEOFLUX
Agree margin band and policies	A/R	I	C
System access and security review	I	A/R	C
Build, test and document	C	C	A/R
Pilot and accuracy review	R	I	A
Run and improve after hand-over	A/R	R	C

R responsible · A accountable · C consulted · I informed

16 How success is measured

Six measures, each with today's baseline and where it comes from, so the 90-day review is a fact check, not an opinion.

MEASURE	BASELINE	TARGET, 90 DAYS AFTER GO-LIVE	SOURCE
Median quote turnaround	2.6 working days	**Under 1 working day**	CRM timestamps
Quotes sent within 1 working day	28%	**70%**	CRM
Work per quote	74 minutes	**30 minutes or less**	2-week time log, repeated
Quotes revised after sending	14%	**5%**	CRM revision count
Matching top-3 accuracy	None yet	**85% or better**	Weekly sample of 50 lines
Win rate	20.9%	**Tracked; target set after 2 quarters**	CRM outcome field

Measurement calendar

Week 0
Baseline locked
From this report

Week 5
Quick wins measured
Turnaround, revisions

Week 10
Pilot gate
Matching accuracy

Day 30 after go-live
First review
All six measures

Day 90 after go-live
Business case check
Win rate trend, margin

REVIEW RHYTHM

Weekly during the pilot, monthly for the first quarter, then quarterly. If a measure misses its target, the review names the cause and the fix.

17 Decision and next steps

Three ways forward. Each is a complete choice; none depends on working with us.

A · Quick wins only

R1, R2, R5 and R6, plus the clarification checklist. Turnaround expected to fall to about 1.5 days.

5 weeks

Recommended

B · Full recommendation

All six recommendations in three phases, with the pilot gate in week 10.

12 weeks

C · Do it in-house

Adopt R5 and the clarification checklist now at no cost; plan the rest with your own team using this report.

2 weeks to start

NO SURPRISES ON PRICE

Whichever option you choose, scope and a fixed price are agreed in writing before any work starts.

WHAT YOU KEEP, WHICHEVER OPTION YOU CHOOSE

- ✓ This report and its recommendations
- ✓ The process maps, today and after
- ✓ The baseline figures and how they were measured
- ✓ The business case and its assumptions
- ✓ The 12-week plan, usable by any team

Next steps

1. Send comments on this report (two rounds are included)
2. A 60-minute read-out with leadership
3. Choose an option; we confirm scope and a fixed price in writing

18 Appendix: assumptions and terms

Assumptions used

1. Volume of 620 quotes a month stays flat; growth would improve the case.
2. Fully loaded staff cost USD 18 an hour, blended across roles, agreed with Finance.
3. Win-rate gap measured on 400 quotes; only part of it is credited to speed (see the business case).
4. Effort is estimated in weeks; scope and price for any build are agreed in writing before work starts.
5. Hosting assumes Sandline's existing cloud account.

How the figures were measured

Work time	Six staff logged start and end times for each step on every quote for two weeks; the median per step is used.
Waiting time	Gap between consecutive CRM timestamps for the same quote, in working days, median of 400 quotes.
Win rate	Quotes marked won in the CRM within 60 days of sending, grouped by turnaround.
Cost	Hours × blended fully loaded rate from Finance; no overheads added.

Terms

RFQ	Request for quotation: a customer asking for price and availability.
Work (touch) time	Minutes someone actively spends on a quote.
Waiting time	Time a quote sits between steps with nobody working on it.
Turnaround	Working days from request received to quote sent.
Private AI	A language model hosted inside the client's own environment, with no data sent to a public AI service.
Top-3 accuracy	Share of lines where the correct part is among the three suggestions.
Margin band	The range of gross margin a quote can go out at without approval.

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This report is yours to keep and use, whether or not you build with us.

Sample report. Sandline Industrial Supply is a fictional company and all figures are illustrative.

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