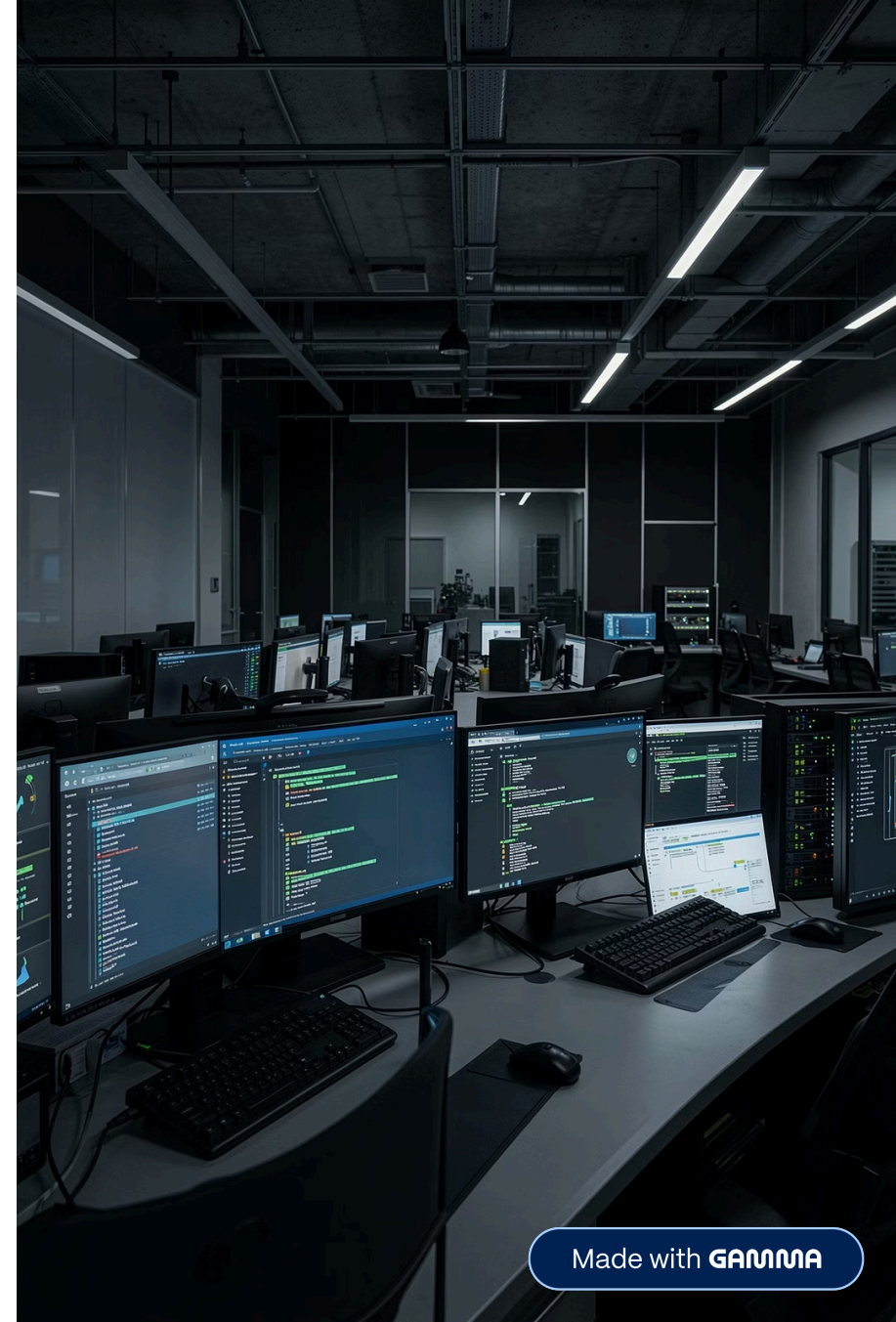


Lead-to-Quote / Estimate Automation System

A done-for-you operational system that turns inbound interest from any channel into structured, quote-ready opportunities — faster and more consistently than any manual process can.

REVENUE INTAKE INFRASTRUCTURE

QUOTE CONVERSION OPERATIONS





The Real Problem Isn't Lead Generation

Most businesses already have enquiries coming in. The revenue leak happens **after** the lead arrives — in the gap between first contact and delivered quote.

Too Many Channels

Meta, Google, WhatsApp, calls, referrals — each handled differently, with no unified intake.

Slow Response

Manual back-and-forth delays quotes by hours or days. Competitors respond first.

Weak Qualification

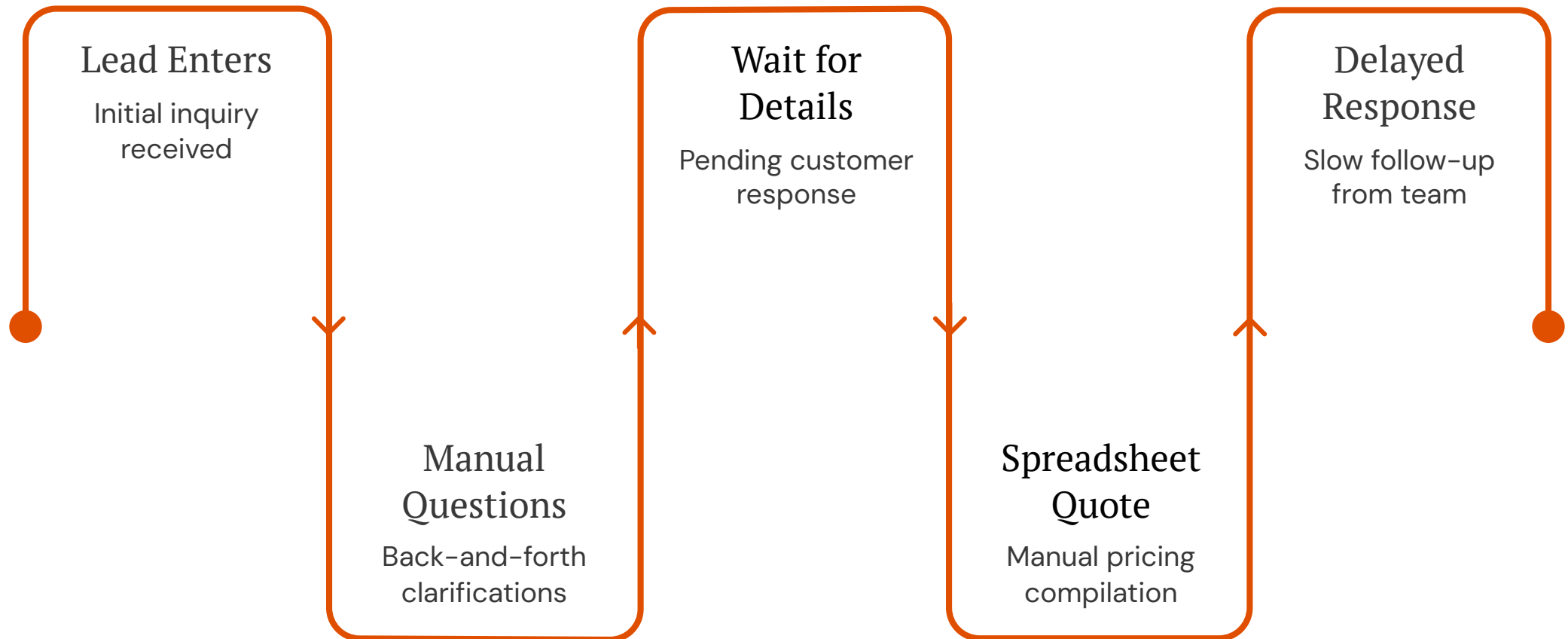
Estimates go out without the right inputs — wasting time and lowering close rates.

No Follow-Up Structure

Quotes are sent and forgotten. There is no system tracking what happens next.

Why Traditional Quote Handling Breaks Down

The typical intake-to-quote journey is a sequence of manual delays — each step creating an opportunity for the lead to go cold or choose a competitor.



Speed matters most precisely where most businesses slow down. Every stage of friction compounds the risk of losing the opportunity entirely.



OPERATOR INSIGHT

A Quote Is Only as Good as the Inputs Collected First

Qualification is not gatekeeping — it is the foundation of an accurate, credible estimate. Industry-specific intake makes the difference.

Real Estate

Budget range, preferred location, purchase timeline

Solar / HVAC

Monthly bill amount, roof size, urgency, issue type

Agencies / B2B

Project scope, goals, decision timeline, budget authority

One Intake System Across Every Entry Point

Leads arrive from everywhere. Without a centralised intake layer, each channel operates in isolation — creating duplication, missed follow-up, and inconsistent data.



Paid Channels

Meta Ads, Google Ads, landing pages, and offline campaigns all routed through a single intake layer.



Messaging & Social

WhatsApp, Instagram DMs, and website live chat captured and normalised into structured records.



Inbound Calls

Call data logged, summarised, and entered into the qualification workflow automatically.

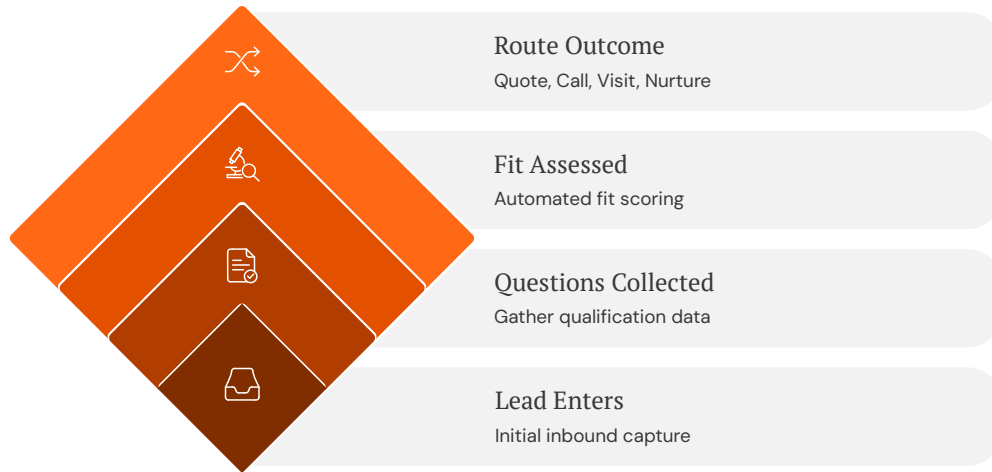


Referrals & Partners

Partner submissions and referral leads processed through the same structured intake — no exceptions.

Qualification & Routing Logic

Not every lead follows the same path. The system assesses fit based on collected inputs and routes each opportunity to the right next step — without manual triage.



Why Routing Matters

Sending every lead straight to a quote wastes capacity and trains your team to work reactively. Structured routing ensures the right resource handles the right lead at the right time.

→ High-fit leads

Proceed directly to estimate assembly

→ Mid-fit leads

Booked for a discovery call or site visit

→ Early-stage leads

Entered into a structured nurture sequence



Quote & Estimate Assembly — Without the Chaos

Once qualification is complete, the system structures everything needed to produce a credible, timely estimate — with human review built in where it matters.

1

Structured Draft

Intake data populates a consistent estimate format based on service type

2

Package Selection

Appropriate service tiers or scopes are pre-matched to the lead's inputs

3

Internal Review

Flagged for human approval when scope complexity or deal size warrants it

4

Follow-Up Attached

A follow-up sequence is linked to the quote the moment it is sent

Follow-Up Structure & CRM Visibility

Sending a quote is not the end of the process — it is the beginning of a measurable conversion stage. Every quote enters a tracked sequence with defined next actions.

Post-Quote Follow-Up Paths

Viewed, No Response

Automated reminder sequence triggered at defined intervals

Revision Requested

Objection logged, revision routed to assigned owner

Gone Cold

Reactivation sequence initiated after a defined dormancy period

What Lives in the CRM

Lead Source

Channel origin tracked for every record

Pipeline Stage

Current status visible at a glance

Quote Status

Sent, viewed, revised, accepted, or stalled

Next Action & Owner

No lead sits without an assigned next step

Before vs. After: The Operational Difference

Before — Fragmented Intake

Enquiries scattered across channels with no central record

Same questions asked repeatedly, manually, by different people

Estimates delayed by missing information and manual effort

Quotes sent, then forgotten — no follow-up structure

CRM incomplete, inconsistent, and unreliable

After — Structured Revenue Intake

All channels feed a single, normalised intake pipeline

Qualification collected once, automatically, before quoting begins

Estimates assembled faster with structured, complete inputs

Every quote enters a defined follow-up and tracking sequence

CRM reflects live pipeline status, source, stage, and next action

✔ Faster response + better structure = more enquiries converted into closed business — without adding headcount.



Build Your Inbound Revenue Infrastructure

If your business depends on quotes, estimates, or proposals to close deals — the gap between enquiry and quote is where revenue is won or lost. We build the operational system that closes that gap.

01

Centralise Lead Capture

Every channel, one intake system

02

Qualify Before Quoting

Structured inputs before estimates go out

03

Route & Assemble

Right path, right resource, right estimate

04

Follow Up & Track

Every quote measurable, no lead unattended

- 📌 This is a done-for-you operational build — not software, not a platform. We design, configure, and implement the system for your business. Let's map your current intake-to-quote process and identify exactly where conversion is being lost.