



WORKED EXAMPLE · KNOW WHAT IT RETURNED

Getting quotes out faster, start to finish

Illustrative: a made-up contract manufacturer puts its requests for quote through the whole method.

StrikeArc Labs · October 2026

strikearc.ai/resources/worked-example-quotes

Getting quotes out faster, start to finish.

A made-up contract manufacturer puts its requests for quote through the whole method: the baseline, the readout, the install and the first quarter, with every figure shown.

ILLUSTRATIVE: A MADE-UP COMPANY

The company, its numbers and its results are invented to show the method. Every figure on this page is illustrative math.

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Every quote waits on one of two estimators.

A made-up contract manufacturer of machined aluminum and steel parts, with two estimators and about forty OEM accounts. Requests for quote arrive by email with drawings attached, and every quote waits on one of the two estimators.

The owner brought one suspicion to the intro call: buyers were awarding work to whoever answered first, and the shop was answering third.

The baseline puts a month of quotes on the record.

The operations manager pulled a quarter of the quote log and the won jobs from the ERP, and scaled them to a month. The estimators counted their own hours for two weeks. Each figure carries how sure they were of it.

WHAT WAS COUNTED	HOW SURE	BASELINE
Requests for quote received	Measured	120
Requests never quoted	Measured	17 (14%)
Quotes sent	Measured	103
Median business days from request to quote sent	Measured	3.5 days
Quotes sent within two business days	Measured	30%
Win rate, quotes sent within two business days	Measured	34%
Win rate, quotes sent later	Measured	19%
Jobs won	Measured	24
Estimator hours per quote	Estimated	2.6
Average order on a won quote	Measured	\$18,400
Gross margin on a won job	Estimated	22%
Work buyers sent elsewhere without asking for a quote	Guess	unknown

Measured means read from a system’s own records. Estimated means counted by hand or taken from last year’s books. A guess is written down so nobody forgets it, and it stays out of the math.

The margin is an estimate because jobs drift from their quote, and the books show the drift a month late. The quote log had the dates, which made the win rates measured figures.

The readout sized the value at stake as a range.

The owner and the senior estimator answered about twenty minutes of questions on a call, then connected the quote inbox, the quote log and the ERP, read-only, after seeing exactly what would be read. StrikeArc Scout scored the plays in the library for fit against those answers. P08 Get quotes and contracts out faster came first.

Before the 45-minute readout, one of our people sized the value at stake and signed every figure. The range is wide on purpose. Fast quotes may win more partly because the easy parts get quoted fast, so the low case credits speed with half of the measured gap in win rate, and the high case with all of it.

VALUE AT STAKE, P08	ILLUSTRATIVE MATH
Quotes moved inside two business days a month, low and high	31 to 52
Extra chance of a win on each moved quote, low and high	7.5 to 15 points
Requests no longer left unquoted, high case only, at the 34% win rate	7 a month
More jobs won a month, low and high	2.3 to 10.2
Gross margin on a won job, 22% of \$18,400	\$4,048
Value at stake a year, low and high	\$111,725 to \$495,475
The low case gets 60% of quotes out within two business days, the high case 80%. The guess about work that never reached the shop stayed out.	

The readout’s do-not-build list had three lines, each with its reason.

- **New contract language.** Contracts assemble only from the two templates the company’s counsel approved, and a person signs every clause. It reopens when counsel approves a new template.
- **Watching public bid boards.** The shop wins repeat work from the accounts it already has, and its history held nothing that public bids would fit. It reopens if the owner sets out to win new

accounts.

- **Production scheduling.** It came up in the intake, and nothing in our library fits. It reopens on the custom path.

The owner decided on the call to start with P08.

The install ran gate by gate.

The play went into the inbox, the quote log and the ERP the shop already used. Nothing went live until the last gate.

Access	IT gave read access to the quote inbox, the quote log, the CRM accounts and the ERP's routing rates, material prices and job history. Write access covered draft quotes in the quote log only. The senior estimator was named the one operator.
Price book	The operations manager checked the routing rates and the material price list. The two estimators picked sixty past quotes as examples of how the shop prices its work.
Rules	The owner set each estimator's pricing authority: a draft price can move 5% either way on the estimator's own signature, and anything beyond that waits for the owner. A tolerance tighter than the shop's standard is flagged for the senior estimator.
Test	Forty past requests were quoted again by the play and compared line by line with what the estimators had sent. The test can fail, and it did on parts with a secondary finish, until the operations manager added the finisher's price list to the price book.
Gate	Counsel approved the two contract templates, and the owner approved the launch with the baseline attached.
Launch	The first request after launch was drafted with three price breaks. The senior estimator changed one price, signed it and sent it the same afternoon.

The senior estimator's time across the install came to about two and a half hours, most of it on the forty test quotes. IT's part was granting the access and checking its scope.

The first quarter shows up in the ledger.

The play reports quote turnaround and win rate. Here is the first quarter against the baseline.

THE LEDGER, FIRST QUARTER		ILLUSTRATIVE MATH	
WHAT THE PLAY REPORTS		BASELINE	QUARTER
Median business days from request to quote sent		3.5 days	0.8 days
Quotes sent within two business days		30%	71%
Requests never quoted		14%	9%
Win rate on quotes sent		23%	27%
Jobs won a month		24	29
More jobs won in the quarter, against the baseline			15
Gross margin on each, the baseline's estimate			\$4,048
Value this quarter, before the cost to run it			\$60,720
Less what the play cost to run this quarter: fees, usage and the hours spent checking its work			\$ -----
Net value this quarter, the figure a person signs			\$ -----
The cost to run comes from your own invoices and your team's time records, so the example leaves those two lines blank.			
Days are business days. A quarter at this rate runs to about \$243,000 a year, inside the readout's range and closer to its low end than its high.			

A person approved every step that mattered.

Every gate is a named human. Agents draft everything; they approve nothing. In this example the names are roles.

- **The owner** set the pricing authorities and approved the launch and the quarter's ledger.
- **Counsel** approved the contract templates, and no other contract language can reach a buyer.
- **An estimator** signs every price on every quote. The machine drafts every page. A human signs every price and every clause.
- **The Value & Deployment Specialist** and the owner signed each figure in the ledger before it was reported.

Some things did not change, for good reasons.

- **The estimators still sign every quote.** Their time per quote fell from 2.6 hours to 0.9. The ledger puts no dollar figure on those hours, because they went straight into the requests that used to go unquoted.
- **Fast quotes win less often than they did.** The win rate on quotes sent within two business days fell from 34% to 30%, because fast now includes the hard parts. The low case allowed for this, which is why it credited speed with half the gap.
- **Two of the fifteen extra wins came from one account.** It was re-sourcing an assembly it had bought elsewhere for a year. The ledger kept both wins and noted where they came from, and it was signed that way.
- **Job margin.** The play prices the quote and stops at the order. Jobs that drift from their quote are work for P10, left for a later quarter.

Run the same method on your own numbers.

Start with the quote log. For each request in the last quarter, you need the date it arrived, the date the quote went out, and whether you won the work. Those three columns give you the turnaround, the win rate by speed and the requests that never got a quote.

- The Workflow Shortlist checks whether quoting is the workflow to fix first, against the others on your list.
- The Workflow Brief writes the workflow down on one page: who owns it, the steps, the systems and today's numbers, each marked measured, estimated or a guess.

Bring them to an intro call, and the readout starts from your numbers. The revenue side of the business, quotes and follow-up included, is in the guide to [sales automation](#).

This example runs on one play.

The play in this example is P08 Get quotes and contracts out faster. It reports quote turnaround and win rate, the lines at the top of the ledger above.

P08	Get quotes and contracts out faster	↑ GROW REVENUE
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Bring the workflow that costs you the most.

Book a 30-minute intro call at strikearc.ai/book, or write to info@strikearc.ai.

The latest version of this piece lives at strikearc.ai/resources/worked-example-quotes.