SOP Template: Standardized Inquiry and Quotation Request Procedure

This SOP defines the **standardized inquiry and quotation request procedure** to ensure consistent and efficient handling of customer inquiries and quotation requests. It outlines steps for receiving, reviewing, and responding to inquiries, preparing detailed and accurate quotations, maintaining communication logs, and ensuring timely follow-up. The procedure aims to improve customer satisfaction, streamline the sales process, and facilitate transparent and professional interactions between the company and potential clients.

1. Purpose

To establish a consistent process for managing customer inquiries and preparing quotations that enhances efficiency, accuracy, and customer satisfaction.

2. Scope

This procedure applies to all staff involved in customer service, sales, and business development activities related to handling inquiries and generating quotations.

3. Responsibilities

Role	Responsibility
Sales/Customer Service Team	Receive and log inquiries, communicate with customers, and prepare quotations.
Sales Manager	Review quotations for accuracy and approve before sending to clients.
Administration	Maintain records of inquiries, quotations, and communications.

4. Procedure

1. **Inquiry Receipt**
   - Accept inquiries via approved channels (email, website, phone, etc.).
   - Log the inquiry details including date, contact information, inquiry reference number, and summary.
2. **Inquiry Review**
   - Assess the inquiry for completeness; request additional information from the client if needed.
   - Assign the inquiry to the appropriate team member or department.
3. **Quotation Preparation**
   - Gather all necessary information and costs to prepare an accurate quotation.
   - Draft the quotation using the company's standard quotation template, ensuring all terms and conditions are clear.
   - Submit the quotation draft for internal review and approval.
4. **Quotation Submission**
   - Send the approved quotation to the client via the agreed channel.
   - Log the submission date and method, and attach a copy to the client record.
5. **Follow-Up**
   - Follow up with the client within the agreed timeline or as per follow-up schedule.
   - Record all follow-up actions and client feedback in the communication log.
6. **Record Keeping**
   - Maintain records of all inquiries, quotations, communications, and related documents.
   - Ensure compliance with data retention and privacy policies.

5. Communication and Documentation

- Use standardized templates for all client communications and quotations.
- Maintain a central log/register for traceability and reporting.
- Communicate professionally and promptly with all potential clients.

6. Review and Continuous Improvement

- This procedure will be reviewed annually or as needed to ensure its effectiveness and compliance with company policies.

- Feedback from team members and clients should be documented for process improvement opportunities.