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Strategic decision brief

Quote-to-order investment choice | Decision owner: commercial director

PROPOSED DECISION - CONDITIONAL

Authorize a bounded process pilot before a wider system commitment. Clarify ownership and required quote information; test whether a shared work queue addresses the remaining constraint.

01 Frame the choice

In this fictional scenario, quote requests pass between sales, pricing, supply planning and order management using separate records. Leadership must choose the next investment without a reliable view of where work waits or returns.

02 Compare options and tradeoffs

Option	Case for the option	Tradeoff / condition
A. Stabilize the process Ownership, intake and review routine.	Directly tests whether unclear handoffs are the main constraint. Limited technical dependency.	Manual coordination remains. Viable only if the pilot preserves pricing controls and service continuity.
B. Configure a shared queue Use suitable existing tools.	Makes status, ownership and exceptions visible across teams.	Depends on consistent data and role design. Configuration may preserve a flawed workflow.
C. Replace the quoting platform Broader capability change.	Could address proven integration or product-complexity constraints.	Greater migration and adoption burden. Requires evidence that simpler options cannot meet the need.

Judgment: Begin with A, while checking the feasibility of B. Revisit C only if observed requirements exceed the workable limits of the current environment.

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Evidence before commitment

Decision criteria, unresolved assumptions and the next authorization gate

03 Use criteria that can change the decision

- **Service continuity:** Can teams maintain an accountable owner and a reliable customer response through each handoff?
- **Commercial control:** Can approved price, product availability and quote version be traced to the final order?
- **Practical adoption:** Can affected roles complete the work with available skills, support and access?
- **Investment discipline:** Are configuration, integration, transition and support needs understood well enough to commit?

04 Close the evidence gaps

Evidence needed	Accountable role	Decision implication
Trace representative quotes from intake to order; separate waiting from active work.	Operations lead	If delays cluster at unclear handoffs, strengthen the process pilot.
Review corrections, approvals and lost context across quote versions.	Pricing lead	If controls cannot be preserved, redesign the pilot before proceeding.
Check tool capability, data access and integration constraints against actual user tasks.	Technology lead	If core requirements cannot be met, assess the wider platform option.

05 Make the next gate explicit

Proceed: The sponsor accepts a verified workflow, a defined pilot cohort, named control owners and agreed baseline definitions.

Hold or reshape: Missing data, unowned exceptions or unresolved pricing controls prevent a reliable trial. Record the reason and the owner of the next evidence-gathering action.