

TECHNOLOGY SOLUTIONS

Technology roadmap

A shared quote-to-order queue | Business owner: commercial director

Proposed first increment: make each quote's owner, status, approved version and next action visible. The existing order system remains the authoritative order record. Stages below are planning assumptions; no delivery dates or outcomes are implied.

01 Sequence work by evidence gates

A

Define the user task

Business owner + operations lead

Depends on: agreed workflow boundary and access to representative work.

Gate: users validate the workflow; owner, measures and unresolved requirements are documented.

B

Test the concept

Product owner + technology lead

Depends on: required data fields, user access and existing-tool capability review.

Gate: intended users complete representative quote and exception tasks in a prototype.

C

Configure a bounded increment

Delivery lead + data owners

Depends on: approved roles, field mappings and a workable handoff to the order system.

Gate: acceptance, permission and reconciliation checks pass; support and fallback are rehearsed.

D

Pilot, assess and hand over

Operations lead + support owner

Depends on: trained pilot users, a baseline and an approved operating runbook.

Gate: sponsor reviews evidence, defects and support readiness; decides to extend, revise or stop.

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Acceptance and ownership

Make the first increment usable, supportable and safe to expand

02 Agree the information boundary

Information	Accountable role	Rule for the first increment
Request and status	Sales operations	One request identifier, a named next owner and a recorded status change.
Price and availability	Pricing / planning leads	Keep the source, approval and validity with the quote version; do not silently overwrite.
Accepted quote and order	Order management	Link customer acceptance to the final quote; reconcile it with the authoritative order record.

03 Demonstrate acceptance with real tasks

- **Normal path:** a pilot user finds the request, understands the next action and traces the released order to the accepted quote.
- **Exception path:** a price or availability change reopens the affected review and records who resolved it.
- **Access and failure:** roles see and change only permitted records; an unavailable handoff is visible and recoverable without duplicate orders.

04 Own support and the next decision

Support owner: maintains access, operating instructions, issue triage and recovery steps. **Data owners:** resolve quality and reconciliation issues. **Product owner:** prioritizes defects and records scope decisions.

Expansion gate: the business owner reviews observed use, task completion, control exceptions and support demand against the agreed baseline. Extend only when acceptance criteria are met and continuing responsibilities are accepted; otherwise revise or stop.