

Keep the promise through the handoff

A quote-to-operations improvement playbook

Map one commercial workflow, reduce missing information and define the checks that keep a quote, commitment and operational handoff aligned.

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Original analysis + working worksheet
Not proprietary survey research

Where does a commercial request lose ownership, context or a required approval?

Sales and operations leaders in industrial supply, warehouse equipment and commercial HVAC businesses.

Three decisions to carry forward

- Follow one real request across teams before choosing software.
- Give every stage an owner, required information and an acceptance check.
- Compare total handling effort and errors; faster entry alone is not a better process.

Evidence and limitations

Original Onyx process guidance, not an engineering, safety or compliance procedure. No client results or revenue lift are claimed. Examples and calculations are illustrative; replace them with permitted operating data before a business decision.

How to use the report

Read the analysis, use the companion worksheet and test the questions against your own operating evidence. Do not substitute an example or an outside survey for a decision by your responsible business and technical owners.

Select one workflow with a clear boundary

A broad instruction to “fix the CRM” hides several different jobs. Choose a bounded path, such as an inbound equipment inquiry becoming a reviewed quotation, or an accepted maintenance proposal reaching the operational owner. Name the beginning, end, participating teams and the records that carry the work.

Collect a small permitted sample of recent requests: completed, delayed and abandoned. Include normal cases and exceptions rather than only the best examples. Redact unnecessary customer information. Compare what people say happens with the actual timestamps, emails, fields and attachments.

Look for repeated information requests, ambiguous stage names, unsupported promises and missing approvals. An issue that appears once may be unusual; a consistent pattern deserves further investigation. Keep the original process available while testing changes. Do not move live customer records or alter production systems during an exploratory review.

Put this to work

- Define the first and final event in plain language.
- Choose a sample that includes failed or delayed requests.
- Record the current owner and evidence for each transition.

Separate customer experience from internal convenience

McKinsey's 2026 global B2B survey highlights inconsistent information across teams and difficulty reaching knowledgeable people as supplier-switching concerns. That is external context, not proof that your specific CRM is causing lost sales.

Onyx interpretation: internal efficiency should be judged alongside the accuracy of the promise a customer receives. A fast form that omits suitability questions can create more work downstream. A tidy sales dashboard can still conceal a customer waiting for a named response.

Ask the customer-facing and operational teams to describe a successful handoff independently. Reconcile differences before automation. If Sales considers “sent” complete but Operations considers “accepted with required information” complete, the problem is a definition and ownership gap, not necessarily a software limitation.

Put this to work

- Record what the customer was told and which version was approved.
- Distinguish sending a request from receiving and accepting it.
- Keep technical suitability and safety decisions with authorized specialists.

Source context: [McKinsey & Company — The surprising economics of B2B growth](#). Full scope notes are on the final page.

Define the minimum handoff record

Use one clear record or linked set of records. It should identify the opportunity, customer need, approved scope, missing information, technical reviewer where needed, agreed next action and current owner. Link to the approved quote or scope rather than copying numbers into several places without version control.

A required field is useful only when someone knows what belongs in it and who can verify it. Do not force a salesperson to invent technical values simply to move a stage. Allow an explicit Unknown or Needs review state with an owner and due decision.

Record element	Why it matters	Acceptance check
Request and account reference	Avoid duplicate or misassigned work	The receiver can identify the correct customer and request
Approved scope/version	Preserve the actual commitment	The latest accepted document is linked
Constraints and open questions	Keep assumptions visible	Unknowns have owners; safety/technical gates are not bypassed
Owner and next action	Prevent an unowned queue	A named role accepts the handoff and next decision

Give transitions explicit acceptance rules

Write the workflow in verbs the team can observe: received, qualified for review, quote approved, quote delivered, customer decision recorded, handoff accepted. Use stages appropriate to your actual business rather than importing a generic sales funnel.

For each transition, identify the producer, receiver, required information and condition that prevents movement. Separate business approval from technical approval where both are necessary. A stage can be ready for commercial discussion while remaining blocked for installation, procurement or system release.

Use the worksheet to record acceptance evidence. A handoff is accepted when the intended receiver can find the agreed materials, understands the commitment and knows the unresolved decisions. A notification sent to a group inbox is not evidence that anyone accepted ownership.

Put this to work

- Document one normal path and the most consequential exceptions.
- Test unknown data, duplicate requests and a changed quote version.
- Confirm how the customer is updated when a required input is missing.

Choose the lightest system that can hold the rules

First ask whether the current tool can reliably support the required fields, ownership and review states. A small team may be able to test the process in a controlled register before configuring a CRM. Higher volume or complex permissions may justify system configuration or integration. The tool follows the accepted process and operating constraints.

Write an integration boundary before implementation: permitted systems, access level, data fields, triggering event, allowed action and recovery method. Do not grant broad write access for a read-only reporting need. Customer communications, quote changes, production scheduling and deletion need explicit authority.

Keep a manual fallback and a visible exception queue. If a synchronization fails, the request must remain visible and recoverable. Repeated retries must not create duplicate tasks or send duplicate messages. Ask the system owner to demonstrate normal operation and recovery using test records before release.

Put this to work

- Test in an approved non-production environment or controlled fixture.
- Require independent review of important failure cases.
- Hand over configuration, ownership and a recovery instruction.

Calculate capacity without calling it cash

Measure total time per completed request, including entry, checking, correction and follow-up. Compare similar work over a defined period and keep error rates alongside time. If the new process shifts work to a more expensive specialist or leaves more exceptions, apparent savings may disappear.

Illustrative arithmetic: 40 requests per week multiplied by 12 minutes of avoidable handling equals 480 minutes, or 8 hours per week. At a hypothetical loaded labor rate of \$45 per hour, the capacity value is \$360 per week. Four weeks at that volume would equal \$1,440 of modeled capacity—not revenue, guaranteed savings or working capital.

Subtract new review effort, software, support and maintenance before comparing alternatives. Cash savings require an actual avoided cost. Revenue improvement requires completed customer outcomes and appropriate attribution. Use low, base and high assumptions when volumes or adoption are uncertain; do not quote a single return percentage without defensible inputs.

Measure	Definition	Important caveat
Handling effort	Minutes across all roles per completed request	Include rework and review
Handoff acceptance	Accepted first-pass handoffs / handoffs reviewed	Define what counts as accepted
Elapsed time	Time between defined start and end events	Separate waiting from active work
Cash effect	Actual avoided expense less added expense	Capacity released is not automatically cash

Pilot, rehearse and decide

Choose a bounded pilot with named users and an agreed review period. Run recent redacted examples and clearly fictional test records through the proposed path. Include a missing specification, a changed scope, a duplicate request, an unavailable reviewer and a system failure. Fix critical defects before customer use.

Practice the handoff with both sender and receiver. Ask each person to explain when to proceed, when to ask a question and when to stop. Training completion is not enough; the receiving team must demonstrate that it can retrieve the correct version and act on the next decision.

At review, compare the baseline with actual pilot evidence. Continue only if the process is usable, ownership holds and consequential errors are controlled. Expand in a separate scope after acceptance. If the improvement is mostly a clearer responsibility or checklist, retain that result rather than forcing an automation project.

Put this to work

- Record defects and the exact retest result.
- Name the client owner for ongoing changes and exceptions.
- Decide continue, revise, expand or stop using agreed evidence.

Keep the evidence with the decision.

Prepared by Onyx Advisory Group. Public sources reviewed September 14, 2026. This is an original decision guide, not commissioned client work or a reproduction of the source reports.

McKinsey & Company – The surprising economics of B2B growth

May 28, 2026. 2026 Global B2B Pulse; nearly 4,000 decision-makers across 13 countries. Not a proprietary Onyx survey.

Quote-to-handoff working register

The companion CSV contains 5 working rows and 10 fields. Open it in your spreadsheet application, preserve the original, and fill a separate copy with approved information.

The worksheet is an original planning aid, not a validated maturity score or a promise of commercial results.

Bring the work into a discussion

Identify the business decision, the evidence you already have and the unresolved question. Use the discussion link on the report's website page when a separately scoped engagement would help.

No third-party endorsement or affiliation is implied. The website discussion brief prepares a local file and does not yet deliver to CRM.