

# ONE QUOTE, FOLLOWED END TO END.

One real commercial situation, traced across every system and every person who touched it — where the work broke, what that instance cost, and what could not be known. This is the deliverable of the first paid engagement.

**A CONSTRUCTED CASE.** Every company, person, date and figure in this document is invented so you can see the deliverable before buying one. The method, the measures and the honesty rules are real. A real report looks like this with your names in it.

## THE FINDING

An **\$86,400 quote went silent for 42 days** past the client's own follow-up norm. On every system the company owns, silence looked identical to progress: no task held it, no trigger watched it, and the only explanation in the building was a guess from memory.

Whether the deal was recoverable is not knowable. That it was **invisible on the day it went quiet** is a fact — and the invisibility, not the quote, is the finding.

## KEY FIGURES

**\$86,400**

quoted — what was at stake, not what is claimed as lost

**42 days**

without action — the client's own stated norm is 14

**288 hrs**

to answer the customer's one open technical question

**4 systems**

touched — and no owner anywhere after 2 June

## HOW TO READ THIS REPORT

Page two is the trace and what it measures; page three is what broke and the shape of the fix. Every figure carries the method that produced it, so it can be checked rather than taken on trust — and where the client's records could not answer a question, that is recorded as a finding, never estimated.

## THE TRACE — "MERCER INDUSTRIAL," QUOTE Q-4471

| WHEN             | WHAT HAPPENED                                                                                                                                                                                | SYSTEM         |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| 12 May 09:14     | Quote request arrives by email                                                                                                                                                               | Shared inbox   |
| 12 May           | Forwarded to the application engineer — leaves the shared record                                                                                                                             | Personal inbox |
| 15 May           | Engineering confirms buildability by reply                                                                                                                                                   | Personal inbox |
| 16 May           | Opportunity created. Close date entered as 30 June — the seller's default, not the customer's date                                                                                           | CRM            |
| 19 May 11:02     | Quote issued. The CRM was not updated — still "quoting" at trace time                                                                                                                        | ERP            |
| 21 May           | Customer replies with one technical question about port configuration                                                                                                                        | Shared inbox   |
| 2 June           | Question answered — after the engineer returned from leave. Nobody else knew it was open                                                                                                     | Personal inbox |
| 2 June – 14 July | <b>Nothing.</b> No reply, no follow-up task, no call logged, no state change anywhere                                                                                                        | —              |
| 14 July          | Trace conducted. Open in the ERP, "quoting" in the CRM, absent from the task list, explained from memory as <i>"I think they went another direction"</i> — a reason that exists in no system | —              |

**Four systems, one quote, no owner after 2 June.** The handoff that failed was not between people — it was between the moment the question was answered and any mechanism that would have made silence visible. And of the sixty-three days this trace covers, the visible working time is a handful of touches — the rest is waiting, all of it invisible.

### WHAT THIS ONE INSTANCE MEASURES

| MEASURE                        | VALUE         | HOW IT WAS PRODUCED                                                                                                          |
|--------------------------------|---------------|------------------------------------------------------------------------------------------------------------------------------|
| RL-04 · Quote-response latency | 168 hrs       | System timestamps — inbox arrival (12 May) to ERP issue (19 May)                                                             |
| RL-03 · Follow-up latency      | 288 hrs       | System timestamps — customer question (21 May) to answer sent (2 June)                                                       |
| Days without action at trace   | 42 (norm: 14) | ERP and inbox timestamps against the norm Mercer stated in their own words at intake                                         |
| CF-01 · Verified-context rate  | Fails         | The only stated reason for the outcome traces to no dated, sourced observation. A recollection is not a source               |
| PL-01 · Quotes rescued         | 1             | Re-engaged 15 July as a result of the trace. What happened after is not part of this report — a teardown ends at the finding |

**What the instance cost — bounded, not precise.** An \$86,400 quote sat unattended for 42 days beyond the client's own norm, through the period in which, by the client's own account, this customer typically decides. \$86,400 is what was quoted, not what is claimed as lost — any claim about money states its limits in the same sentence.

## WHAT BROKE, PLAINLY

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Nobody in this trace did anything wrong — everyone acted on the information they had. That is why the four failures below are system failures, and system failures can be fixed.

- 1 The quote left the shared record on day one and lived the rest of its life in personal inboxes and an ERP module the CRM never heard from.
- 2 Answering the customer's question closed the loop in one person's head and nobody else's. From 2 June, silence was indistinguishable from progress in every system the company owns.
- 3 Nothing counts a quote that goes quiet. A lost deal gets a post-mortem; Q-4471 was on course to get nothing, because nobody is accountable for a thing that did not happen.
- 4 The close date was a default — so the one field that could have raised an alarm was wrong by design.

## WHAT COULD NOT BE CAPTURED — FINDINGS, NOT BLANKS

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**Whether the customer bought elsewhere, and when.** No system at Mercer records competitor outcomes. NOT-CAPTURED — unknowable until someone asks the customer.

**How many other quotes are in the same state.** This trace covers one. The count of silent open quotes is a different, larger piece of work — named so the boundary of this one stays visible.

**RL-01 and RL-02** (signal-to-decision, decision-to-action): Mercer's systems carry no timestamp for a decision as distinct from an action. Recorded as NOT-CAPTURED, not estimated — seller recollection is never substituted.

## WHAT THE FIX LOOKS LIKE — THE SHAPE, NOT THE INSTALL

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One place a quote lives from request to outcome. One trigger that fires on silence — the client's own norm, not an industry number — instead of on somebody remembering. One rule for what "answered" means, so a closed question is visible to more than one person. All of it in systems the client already owns. **Putting it in place and measuring before and after is the next piece of work, and it is a separate decision that stays the client's.**

## THE LIMIT, AND THE NEXT QUESTION

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**One situation is one situation.** This trace shows where this instance broke — it does not prove the pattern, and this report will not pretend it does. Whether it is the pattern takes several situations, examined the same way. That question is the next conversation, and it is exactly one email long.

signaltrapper.com · kevin@signaltrapper.com