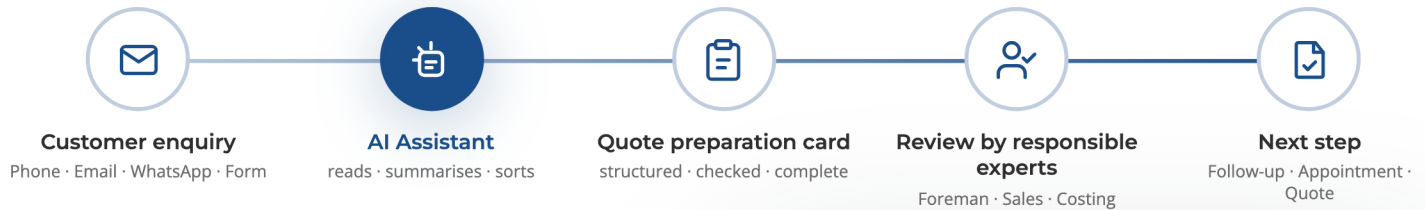


AI Assistant for Quote Preparation

A typical scenario in the trades, service and technical contracting businesses

An illustrative scenario from everyday operations — not a real customer reference and with no invented project results. The AI prepares enquiries in a structured way. Pricing, costing and sign-off remain with the business.

THE PROCESS From an incomplete enquiry to a reviewable basis for a quote



THE SITUATION

Many enquiries — rarely ready to quote right away

Enquiries arrive through many channels and look simple — yet often lack the details needed for a solid quote. The result is follow-up questions, delays and extra coordination.

FREQUENTLY MISSING DETAILS

- Measurements & photos
- Scope of work
- Timeframe
- Contact person
- Technical details
- Project reference

AI SUPPORT

Preparing enquiries in a structured way

- ✓ Read, summarise and classify incoming enquiries
- ✓ Identify type of work, site, urgency & contact person
- ✓ Check for missing mandatory details and draft follow-up questions
- ✓ Organise photos, sketches & plans and link them to the case
- ✓ Route to the right department — hand off to CRM, email or a task

Quote preparation card

DRAFT

ENQUIRY TYPE	Request for quote
SERVICE	derived from the enquiry content
SITE	Address · Job site · Facility
URGENCY	normal · to review
DOCUMENTS	Photos · Sketches · Plans · Email attachment

MISSING DETAILS

Measurements · desired timeframe · contact person · on-site visit required

→ RECOMMENDED STEP

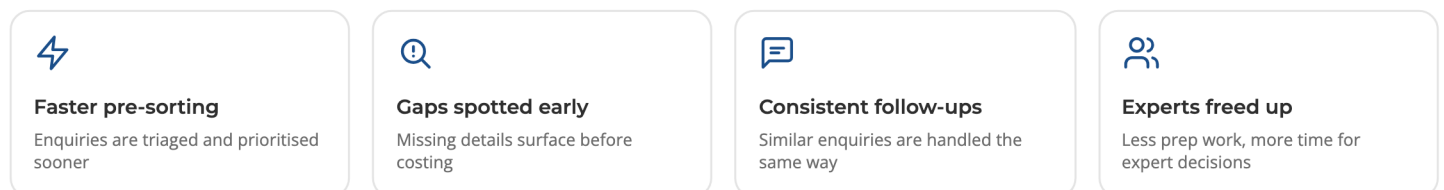
Follow up with customer → Owner: Office / Foreman / Costing

Illustrative format. Fields, terms and hand-off paths are adapted to each individual business.

✓ The AI prepares. The business decides.

- Costing & price
- Technical feasibility
- Material selection
- Scheduling & staffing
- Customer communication
- Quote sign-off

BENEFITS FOR THE BUSINESS Better groundwork, fewer follow-ups, faster triage



ROLLOUT WITH KRAMBERGAI Aligned with how the business actually works

01 Understand

Channels, enquiries, missing info, people involved

02 Assess

Which quote types are suited to AI support?

03 Structure

Define the enquiry card, follow-ups and sign-offs

04 Implement

Setup, templates, terminology, systems

05 Operate

Review, improve and expand to more areas

KrambergAI AI Starter Check

The structured entry point for mid-sized companies with a high volume of quote requests — sensible, realistic and reviewed. Hosting & data processing in the EU. GDPR-compliant.

→ krambergai.com