

Process review: quote to invoice

Example Forwarding Ltd (fictional) · road freight forwarder, 6 people, one branch · review size: small · files received: quote template (Excel), invoice procedure (Word, 2 pages), whiteboard photo of the job flow

Summary. The process works because two experienced people hold it together, but three steps have no record and extras are lost between the driver and the invoice. Based on your numbers (about 120 jobs a month, extras on about 30% of jobs, €80 per extra, about 40% not billed), we estimate **about €1,152 a month in unbilled extras**. Invoices go out 9 days after delivery on average, which ties up cash. Fixing the top three items below should take about a week.

Owners

Partly

2 steps depend on one person

Triggers

Clear

8 of 10 steps

Records

Gaps

3 steps leave no record

Money

€1,152/mo

estimated leak

Audit

Not yet

see section 3

1. Your process as it works today

#	Step	Owner	Starts when	Record today	
1	Price request received	Sales	Email or phone call	Email only, no request log	●
2	Cargo details checked	Sales	Request received	Not recorded; depends on the person	●
3	Quote built and sent	Sales	Details complete	Quote in Excel, no exclusions block	●
4	Quote accepted	Customer	Quote sent	Acceptance email	●
5	Job opened, carrier booked	Operations	Acceptance received	Job in system, transport order	●
6	Extras recorded (waiting, storage)	Operations / driver	Extra happens	Driver phone call, no log	●
7	Delivery and proof of delivery	Carrier / driver	Goods delivered	POD photo, sometimes missing	●
8	Invoice checked against the quote	Billing	POD received	No check	●
9	Invoice sent	Billing	Check done	Invoice, on average 9 days after delivery	●
10	Payment followed up	Owner	Invoice overdue	Ad hoc calls, no reminder steps	●

● works ● works but fragile ● gap

2. Where money leaks

Leak	Why it happens	Estimate
Extras not billed	No exclusions on the quote and no log of waiting time or storage; drivers phone it in and it is forgotten.	about €1,152 / month
Slow invoicing	Invoices wait for PODs that are not chased; average 9 days after delivery.	cash tied up: about 9 days of turnover
Invoices not checked	No check against the quote; price changes agreed by phone are missed.	not measurable from the files
Late payers	Follow-up depends on the owner having time.	see your overdue list

3. Audit readiness

What an auditor will ask	Typical reference	Today
Is the procedure written, current and approved?	ISO 9001:2015, 7.5	● Written for invoicing only; no version or approver
Do you review the customer's requirements before you accept the job?	ISO 9001:2015, 8.2.3	● Cargo-details check is not recorded
Can you show who did each step, and when?	ISO 9001:2015, 8.5.1 and 7.5.3	● Yes for booking and invoice, no for extras and the check
Do you measure and review the process?	ISO 9001:2015, 9.1	● No measures (time to invoice, extras billed)

4. What to fix first

#	Change	Owner	Effort	Tool
1	Add an exclusions block with rates to every quote (waiting, storage, extra stops, failed pickup)	Sales	1 day	Quote-to-invoice kit: quote template
2	Start a same-day extras log; drivers message the time in and out	Operations	2 days	Quote-to-invoice kit: extras log
3	Check every invoice against the quote and the extras log before sending	Billing	1 day	Quote-to-invoice kit: invoice checklist
4	Invoice within 2 working days of POD; chase missing PODs daily	Billing	1 week	Booking and carrier kit: POD and billing hand-off
5	Write down the cargo-details check as a 6-point checklist	Sales	2 hours	Quote-to-invoice kit: process plan
6	Name one owner for payment follow-up and use 3 reminder steps	Billing	1 day	Quote-to-invoice kit: reminder emails
7	Keep a simple request log (date, customer, quoted, won/lost)	Sales	2 hours	Process plan, records list
8	Add revision control to the procedure (version, date, approver)	Owner	1 hour	Process PDF document control

#	Change	Owner	Effort	Tool
9	Review margin per job monthly for the top 10 customers	Owner	Monthly	Booking and carrier kit: rate check
10	Run a 30-day review of the changes with the team	Owner	1 hour	Rollout plan: five checks

5. How to roll it out

Use the five checks: explain why to the team (the €1,152 a month), name the owners above, train in one 30-minute session, watch the first two weeks closely, and review after 30 days: extras billed, days from delivery to invoice, invoices checked.

This is a sample with a fictional company and fictional numbers, to show the format. A real review uses your files and your numbers. A process review is a professional opinion on how the process is organised. It is not legal, tax or customs advice and not a certification audit.