



Quote-to-booking handoff review

The customer said yes. Use this sheet to check whether the approved work has a real booking, a documented wait or an unresolved handoff.

Review date

Reviewer / role

Review period / cohort

1. Agree what belongs in this review.

1. Choose distinct jobs with approved quotes in one review window. Include older unresolved jobs deliberately; note that choice above. Use the accepted version and agreed scope.
2. Check readiness separately from approval: deposits, materials, permits and customer timing can legitimately delay booking. Match the actual job and visit, not just a customer name.
3. Count each selected job once: verified booking, documented wait, or unknown. A tentative date or an unrelated visit does not confirm this work is booked.

2. Bring a count to the conversation.

Keep all counts within the same reviewed group. A blank is unknown, not zero. Write 0 only when you have confirmed none.

Distinct approved jobs reviewed

Jobs with a verified booking

Other jobs on a documented wait

Jobs still unknown / needing review

3. List the records that need another look.

Internal reference	Booking / wait / unknown	Evidence / record checked	Owner / next check

Use only internal references here. Continue longer lists in your existing records.

The categories should account for the reviewed jobs without counting a job twice. A gap means check the records; it does not prove a missed booking. Zero reviewed jobs says nothing about the rest of the business.



One approved job. One clear next step.

Use one copy for a record that still needs an answer. Confirm evidence before taking the next action.

Internal record reference

Review date

Responsible person / role

Next check date

1. Match the records.

Read the accepted quote and scheduling record together. Confirm the approved scope, the relevant visit, the booking date and any readiness conditions.

Accepted quote version / scope evidence

Matching job / visit / booking evidence

Readiness condition and evidence checked

2. Name what is known and what is waiting.

If work is waiting, record the agreed reason and the person who can clear it. If the evidence is incomplete, keep the status unknown.

Confirmed status, or what remains unknown

Reason for waiting / evidence still needed

3. Give the next step an owner.

Next action and the person who will do it

Next check: date, record to reopen and what will confirm the answer

Close the review when the matching booking or the documented next step is confirmed. Respect an agreed wait or changed customer plan.