

Prime Global Logistics Quote Analytics - Discovery Questions

Meeting Objective

Validate assumptions and gather detailed requirements for the quote analytics project to ensure we deliver maximum value from day one.

Assumptions Made	What is Required as Next Steps
Process & Pain Points	
Quote preparation is manual and time-consuming	Map end-to-end quote process from enquiry to send-out
Multiple data sources create inefficiency	Identify all data sources (CargoWise, emails, spreadsheets, past quotes)
Finding similar past quotes is the primary bottleneck	Confirm which steps take longest and where errors occur most
Team members prepare quotes differently	Document if process is standardized or varies by user
User Requirements	
Quick access to past line items is the main value driver	Validate what makes quotes "similar" (route, customer, commodity, volume)
Sales team are primary users	Identify all user types and their specific needs
Users want <2 second response times	Confirm acceptable search/retrieval speeds
Different fields matter for internal vs client use	Verify critical fields for review and client-facing requirements
Data & Analytics	
Key fields: cost, margin, transit time, conditions	Identify fields that always need double-checking
Natural language search would be valuable	Test interest in search capabilities ("quotes to Dampier <20 days transit")
Basic analytics sufficient (win/loss, pricing trends)	Explore desired insights (margin by supplier, alerts for low margins)
Margin leakage is a concern	Confirm if tracking wrong rates/costs not passed on is priority
Technical Architecture	
Cloud hosting (AWS/Azure) is acceptable	Confirm security/compliance requirements
Web-based access preferred	Validate if mobile access needed
Integration with existing systems required	Define integration points and data sync frequency
Historical data ~2-3 years needed	Confirm data volume (years of history, quotes/month)

Priority Discovery Areas

Quick Wins

- Which single improvement would have the biggest immediate impact on quote turnaround time?
- What frustrates the team most about the current process?

Data Intelligence

- What insights would help prevent margin erosion?
- Which dashboards/alerts would proactively improve quote quality?

Future Vision

- Beyond faster quoting, what strategic advantages could this system provide?
- How could analytics help win more business or improve pricing decisions?

Key Success Metric: What percentage reduction in quote preparation time would make this project a clear success?