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Managing the B2B Sales Process in a Project-Driven SME: A Participant-Observation Case Study of HVAC Duct and Insulation Services in Maharashtra, India

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Abstract

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Purpose. Small, project-based manufacturers are expected to run professional sales processes, but most guidance on selling, sales funnels and customer relationship management (CRM) is written for large firms. This paper examines how the business-to-business (B2B) sales process actually operates in a small, family-run HVAC ductwork and insulation firm in Maharashtra, India, and where it is exposed to avoidable loss.

Design/methodology/approach. A single-case, qualitative design based on participant observation of the firm's sales function over about nine weeks in 2026, supported by informal staff discussions, a contemporaneous learning diary and the firm's catalogue. Four recurring workflows were mapped and compared with five theory-based propositions through pattern-matching. The firm did not release lead, quotation, conversion or revenue data, so none are reported or estimated.

Findings. Enquiries follow a recognisable, narrowing funnel, but it is managed informally. Completeness of requirement capture and the clarity of the sales–technical hand-off appeared to determine how quickly and accurately quotations were prepared. Regular follow-up appeared to keep prospects engaged through long decision cycles, and the main difficulty was tracking follow-ups rather than generating leads. The quotation and the customer record were the central instruments of the process, and sustained relationship management appeared to underlie client retention. The central tension is between a business model that depends on trust and a set of routines held largely in memory.

Practical implications. Five low-cost measures are proposed: a shared enquiry register, defined follow-up intervals, a single customer database, a written sales–technical hand-off and structured outcome feedback. Reusable templates are provided.

Limitations and originality. The study rests on one firm, a short period and a single observer, and its findings are propositions for testing, not statistical results. It contributes process-level qualitative evidence from a small Indian engineering-service firm, a setting under-represented in the sales literature.

Keywords: B2B sales; sales funnel; consultative selling; customer relationship management; sales–technical interface; HVAC; small and medium enterprises; India



1. Introduction

1.1 Background

Business-to-business (B2B) selling in engineering-intensive industries differs sharply from the retail transactions that dominate textbook accounts of marketing. The product is rarely a catalogue item. A hospital, a pharmaceutical plant or a hotel does not buy "a duct"; it buys a ventilation solution that has to fit a particular building, satisfy a particular airflow and hygiene requirement, and be installed within a construction schedule that other contractors are also working to. Buying decisions of this kind involve several people with different concerns, take weeks or months, and are usually preceded by a competitive request for quotations (Webster & Wind, 1972; Sheth, 1973). Selling into such decisions is therefore as much a matter of coordination and information handling as of persuasion.

This paper studies that problem in a setting that receives little attention in the sales literature: a small, family-run manufacturer and installer of heating, ventilation and air-conditioning (HVAC) ductwork and thermal insulation in Chhatrapati Sambhajinagar (formerly Aurangabad), Maharashtra. The firm, Arati Insulation, was founded in 1983 and sells fabricated ducts, hot and cold insulation, cladding and installation services to pharmaceutical, healthcare, hospitality, retail and industrial clients. It sells through relationships, referrals and direct enquiries rather than advertising, quotes each job individually, and relies on spreadsheets and telephone calls rather than dedicated customer relationship management (CRM) software.

The empirical material comes from the author's participation in the firm's sales function for roughly nine weeks between June and August 2026. The study is not a survey, and the firm did not release figures on leads, quotations, conversion or revenue. What it offers instead is a detailed, theory-guided account of how enquiries are actually handled, where the process works, and where it is exposed to avoidable loss. That kind of account is useful in its own right, and it is the type of evidence from which later quantitative work on small project-based firms can be designed.

1.2 Context: a growing but contested market

The setting is commercially attractive. Published estimates put the Indian HVAC market at roughly USD 10 to 14 billion in 2024–2025 and forecast sustained growth, driven by rising temperatures, urbanisation, commercial construction and energy-efficiency regulation (IMARC Group, 2026a; Mordor Intelligence, 2025). Growth, however, does not translate automatically into profitable work for a regional fabricator. Buyers are large and often invite several quotations; raw-material prices move; and skilled labour is scarce. In such conditions a small firm's ability to convert enquiries into orders depends heavily on how well it runs its sales process, a point developed in Section 3.

1.3 Contributions

The paper makes four contributions. First, it documents the end-to-end sales-support process of a project-driven HVAC and insulation SME as a set of explicit process maps, something that, in the firm studied, had been followed informally and never written down. Second, it reads that process against established theory on B2B buying, consultative and relationship selling, the sales–technical interface and CRM, and states testable propositions. Third, it identifies specific process frictions and links each to a low-cost corrective measure. Fourth, it supplies reusable record-keeping templates (Appendix A) that other small contractors can adapt.

1.4 Structure of the paper

Section 2 states the research problem, objectives and questions. Section 3 outlines the industry context. Section 4 reviews the literature and Section 5 identifies the gap and sets out the conceptual framework. Section 6 explains the methodology, and Section 7 describes the case firm. Sections 8 and 9 present the analysis and the results. Section 10 discusses the results in light of the literature, Section 11 draws out managerial implications and recommendations, Sections 12 and 13 deal with limitations and future research, and Section 14 concludes.



2. Research Problem, Objectives and Questions

2.1 Statement of the problem

Small project-based manufacturers are expected to behave like professional selling organisations: to qualify leads, capture technical requirements accurately, issue timely and correct quotations, follow up through long decision cycles and sustain client relationships. Yet most of the guidance for doing so is written for large firms with dedicated sales operations, formal CRM systems and specialist pre-sales engineers. In a firm of the size studied here, these functions are performed by a few people working informally and across departmental boundaries. The practical problem is that the quality of the sales process then depends on individual memory and goodwill, so that enquiries can be lost, requirements can be misread, and quotations can be delayed without anyone noticing until the customer has gone elsewhere.

The research problem, therefore, is to understand how the B2B sales process actually operates in a small, relationship-driven HVAC and insulation firm, which of its features are consistent with established sales theory, and where the process is exposed to avoidable loss.

2.2 Research objectives

The study has five objectives:

- **O1.** To understand the B2B/project sales process followed for HVAC ducting and insulation solutions at the case firm.
- **O2.** To study how customer requirements are identified and converted into suitable solutions through interaction between the sales and technical/project teams.
- **O3.** To examine the lead-generation and customer follow-up practices used to build and sustain the sales pipeline.
- **O4.** To understand the quotation process and the role of customer record management in supporting the sales function.
- **O5.** To evaluate the role of relationship management and coordination in sustaining long-term B2B project-sales relationships.

2.3 Research questions

- **RQ1.** How does an enquiry move through the firm's sales process, and how closely does this follow the stage models in the sales literature?
- **RQ2.** How does the quality of requirement capture and sales–technical coordination affect the efficiency of quotation preparation?
- **RQ3.** How do follow-up practices and lead handling affect whether prospects remain engaged through long decision cycles?
- **RQ4.** What roles do the quotation and the customer record play in the process, and what weaknesses are visible in how they are handled?
- **RQ5.** How does relationship management contribute to the firm's ability to retain clients and generate referrals?

Each question corresponds to the objective with the same number; this one-to-one correspondence is carried through to the analysis in Sections 8 and 9.

3. Industry Context

3.1 Market size and growth

Arati Insulation operates where two industries meet: HVAC, which covers air conditioners, chillers, air-handling units and ductwork, and thermal insulation, which reduces heat transfer in buildings, pipelines, tanks and ducts. Estimates of the size of the Indian HVAC market vary considerably because research agencies define the market differently, for



example equipment only versus equipment plus services. Table 1 lists five commercial estimates collected for this study. They are reproduced as published; the paper has not been able to audit the underlying models, and they are used only to establish the general direction and order of magnitude of growth.

Table 1. *Published estimates of the Indian HVAC market*

Source	Base year (USD bn)	Projection	Stated CAGR (%)	CAGR implied by end-points (%)	Notes
IMARC Group (2026a)	2025: 13.56	49.0 bn by 2034	14.9	15.3	Small gap likely reflects base-year convention
P&S Intelligence (2024)	2024: 11.8	29.4 bn by 2030	16.3	16.4	Consistent
Mordor Intelligence (2025)	2025: 12.14	17.41 bn by 2030	7.5	7.5	Consistent
Research and Markets (2026)	2025: 10.06	18.89 bn by 2034	7.25	7.3	Consistent
Technavio (2025)	–	Incremental ~3.5 bn, 2025–2029	10.5	n/a	No end-point values available

Note. Stated figures are as reported by each publisher. The implied CAGR is the author's calculation, (end value / base value)^(1/years) − 1, and is included only as an internal-consistency check.

The implied-growth check in Table 1 shows that four of the five sources are internally consistent, and that the spread between them is wide: the lowest forecast growth rate is under half the highest. Figure 1 shows the base-year estimates. The disagreement is mostly about scope rather than direction; every source describes a market that will continue to expand over the next decade. For a regional contractor that is useful context, but it also means that no single figure should be used to plan capacity.

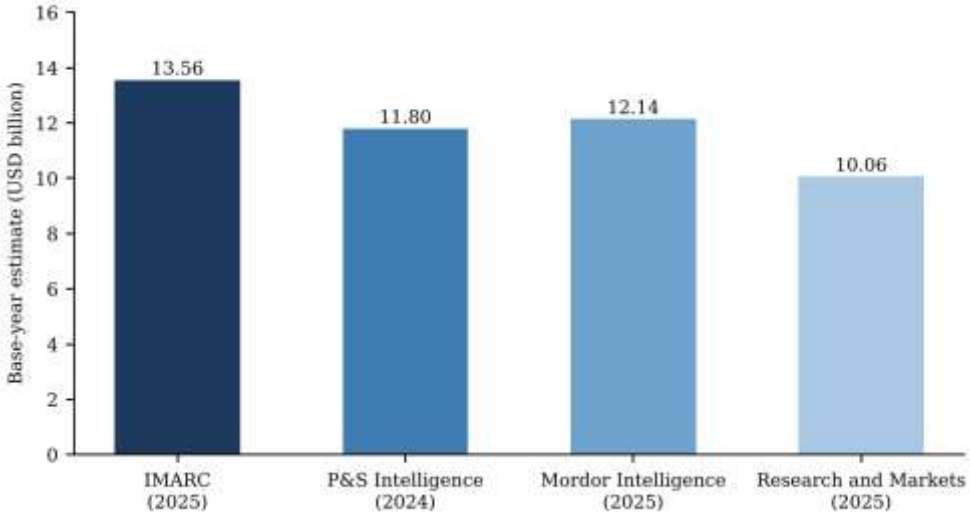


Figure 1. *Base-year estimates of the Indian HVAC market from four published sources (USD billion)*

Industry commentary adds two qualitative points. Trade-press reports link more frequent heatwaves to sustained double-digit demand growth, and note that household air-conditioning penetration in India remains low (Thermal Control Magazine, 2026). On the insulation side, one estimate values the Indian insulation market at about USD 2.6 billion in 2024 (IMARC Group, 2026b), with building insulation a smaller segment (IMARC Group, 2026c). The Energy

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Conservation Building Code (ECBC), administered by the Bureau of Energy Efficiency, sets minimum energy-performance requirements for large commercial buildings, including envelope insulation, and is a structural driver of demand for insulation work (Bureau of Energy Efficiency, n.d.; International Energy Agency, n.d.).

3.2 Competitive structure

The industry can be divided into four sub-sectors: equipment manufacture, dominated by branded national and multinational firms; ductwork fabrication and installation, populated by large contractors and many regional SMEs; insulation materials and application; and design, consultancy and turnkey MEP (mechanical, electrical and plumbing) contracting. The case firm sits in the second and third. Table 2 applies Porter's (1979) five forces to this niche, drawing on the sector reading carried out for this study and the internship observations.

Table 2. *Five forces in the regional HVAC ducting and insulation niche*

Force	Intensity	Reasoning and implication for sales
Threat of new entrants	Moderate	Basic fabrication needs little more than sheet-metal machinery and labour, so small entrants are common; turnkey work for regulated clients needs references, engineering capability and track record, which limits entry at the upper end.
Supplier power	Moderate	Galvanised iron, aluminium, stainless steel and insulation materials come from many producers, but price swings affect margins and make quotation validity a practical concern.
Buyer power	High	Large institutional and industrial buyers often seek competing quotations and can press on price, schedule and specification. Reliability and reputation therefore matter as differentiators.
Threat of substitutes	Low to moderate	Ductwork is hard to replace once a design is fixed, although system choices such as VRF or pre-insulated panels can shift the type of work required.
Competitive rivalry	High	National brands compete at the equipment end, while regional fabricators and installers compete on price, turnaround and quality for project work.

Note. Intensity ratings are the author's qualitative judgement and are not derived from measured data.

Two features of this structure matter for what follows. Buyer power is high, so a supplier cannot rely on the product alone to win work; and rivalry is intense, so small slips in responsiveness or accuracy are costly. Both point to the sales process, rather than price or product, as the area where a regional firm can most plausibly improve its position. The same sector reading also suggests that industry trends, such as growing preference for single-vendor turnkey delivery, favour firms that combine manufacturing and installation, which is the case firm's model.

3.3 Constraints facing regional firms

Three constraints recur in the sector material and were also visible in the firm. The first is input-cost volatility in steel and aluminium, which complicates fixed-price quotations. The second is a shortage of skilled sheet-metal workers and insulation applicators, which makes delivery time a competitive variable. The third is the coordination burden of turnkey projects, in which design, fabrication and site teams have to be synchronised. The first two are largely outside the control of a sales function. The third is not, and it is the subject of much of the analysis below.

4. Review of Literature

4.1 Organisational buying and the nature of B2B selling

Early models of organisational buying showed that purchases by firms are rarely the decision of one person. Webster and Wind (1972) described a "buying centre" in which individuals occupy roles such as user, influencer, buyer, decider



and gatekeeper, and Sheth (1973) proposed that industrial purchasing decisions are shaped by the differing expectations of those involved and by how conflicts among them are resolved. The practical consequence for a seller is that a single conversation with one contact seldom settles an outcome; the seller must be able to address technical, commercial and operational concerns, often through different people on the customer's side.

Business markets also differ in how buyers and sellers relate over time. Cannon and Perreault (1999) found that buyer–seller relationships in business markets fall into distinct types, ranging from arm's-length exchange to close collaboration, and that the appropriate behaviour varies accordingly. Dwyer, Schurr and Oh (1987) described relationship development as a sequence of phases, from awareness and exploration to expansion and commitment. These contributions suggest that a project seller such as a ductwork contractor is simultaneously engaged in individual transactions and in a longer relationship whose value lies in repeat work and referrals.

4.2 The selling process and the sales funnel

The idea that selling proceeds through ordered steps is one of the oldest in the sales literature. Moncrief and Marshall (2005) trace how the traditional sequence of prospecting, approach, presentation, handling objections, closing and follow-up has evolved to accommodate relationship-oriented activity, such as needs analysis and post-sale service. The "funnel" or pipeline is the managerial counterpart of this idea: prospects enter at the top and are progressively qualified, so that fewer remain at each later stage. The funnel is useful less as a description of buyers than as a management tool, because it makes visible where prospects are lost and which stages deserve attention. Its value depends on stage definitions being clear and on every lead being recorded, which is a demanding condition for a small firm without systematic records.

4.3 Consultative and relationship selling

Consultative selling treats the salesperson as an adviser who diagnoses a need before recommending a solution. Rackham's (1988) SPIN approach is the best-known structured version: the seller moves from questions about the customer's situation to questions about problems, their implications, and the payoff of solving them. Weitz and Bradford (1999) describe the salesperson's role as lying on a continuum from transactional, through consultative, to partnership, with the appropriate role depending on the customer's needs and the nature of the offering. Jolson (1997) argues that relationship selling extends the seller's attention beyond the single sale to the long-run value of the account. For custom-engineered products, in which a poorly understood requirement leads directly to a wrong specification, consultative selling is not a stylistic choice but a functional necessity.

4.4 Quotations and the sales–technical interface

When a product is made to order, the quotation is where the customer's requirement is converted into a commercial commitment. Its accuracy depends on information that originates with the customer, is interpreted by sales staff, and is costed and checked by technical staff. This makes the interface between sales and technical functions a critical point. Homburg, Jensen and Krohmer (2008) show that firms organise marketing and sales in distinct configurations, differing in the degree of formalisation and cross-functional integration, and that these configurations are associated with differences in firm performance. Biemans, Brenčič and Malshe (2010) examine marketing–sales interface configurations in B2B firms and show that integration between the two does not occur by default and has to be actively managed. Although these studies concern marketing and sales rather than sales and engineering, the underlying point, that integration across functional boundaries has to be built rather than assumed, applies equally to the sales–technical hand-off in a project-based firm.

4.5 Follow-up, customer records and CRM

Customer relationship management (CRM) is variously understood as a technology, a set of processes and a strategy (Zablah, Bellenger & Johnston, 2004). Payne and Frow (2005) propose a cross-functional framework that includes strategy development, value creation, multichannel integration, performance assessment and information management. Reinartz, Krafft and Hoyer (2004) conceptualise CRM as comprising initiation, maintenance and termination of customer relationships, and show that firms' CRM processes are related to performance. In small firms, the technology element is often absent, but the underlying discipline, namely knowing who the customer is, what has been said, and



what should happen next, is not optional. A spreadsheet that is consistently maintained arguably supports more effective follow-up than an expensive system that is not.

4.6 Relationship marketing, trust and retention

Relationship marketing shifts attention from individual transactions to the maintenance of long-term exchange relationships (Grönroos, 1994; Sheth & Parvatiyar, 1995). Morgan and Hunt (1994) identify commitment and trust as central mediating constructs in successful relationships. Ulaga and Eggert (2006) show that supplier differentiation in business relationships rests on more than price and product: service support, personal interaction and supplier know-how are among the sources of value that buyers recognise. The economic case for retention was stated early by Reichheld and Sasser (1990), who argued that retaining customers can be considerably more profitable than acquiring new ones. For a firm whose clients (pharmaceutical plants, hospitals, hotels) tend to expand, renovate and refer, such a reputation for reliability is a commercial asset.

4.7 Services marketing and the extended marketing mix

Because much of a ductwork contractor's offering is delivered on site and over time, the extended services marketing mix is relevant. Booms and Bitner (1981) added people, process and physical evidence to the traditional four Ps. In the context of a contractor, people are the fabricators and installers whose skill determines quality; process is the sequence from enquiry to commissioning; and physical evidence includes references, certifications, vehicles and tools that signal competence before the work is seen (Kotler & Keller, 2016).

5. Research Gap and Conceptual Framework

5.1 Research gap

In the literature consulted for this paper, three limitations stand out. First, much of the work on selling, sales funnels and CRM is based on large firms or on samples drawn from developed markets, where specialised sales operations are common. Second, the integration literature tends to study marketing–sales interfaces rather than the sales–engineering hand-off that dominates in made-to-order industries. Third, studies of Indian HVAC and insulation mostly take the form of market reports concerned with size and growth; they say little about how selling is actually done within the firms that compete in these markets. As a result, there is limited process-level, qualitative evidence from small Indian engineering-service firms on how requirement capture, quotation, follow-up and relationship maintenance operate in practice and where they break down. This study addresses that gap through a single in-depth case. The claim is deliberately modest: the paper does not test theory statistically, but uses a theoretically informed case to refine propositions that later studies can test.

5.2 Conceptual framework and propositions

Drawing on Section 4, the paper treats the case firm's sales process as a sequence of stages (lead, qualification, requirement capture, technical solutioning, quotation, follow-up, order and relationship maintenance) supported by three enabling mechanisms: sales–technical coordination, records and follow-up discipline, and relationship capital. Five propositions, one for each research question, structure the analysis. They are stated in Table 3. They are propositions rather than hypotheses: they are meant to be assessed by pattern-matching observations against theory (Yin, 2018), not by statistical test.



Table 3. *Propositions derived from the literature*

No.	Proposition	Theoretical basis	Related RQ
P1	In a made-to-order B2B firm, enquiries pass through a recognisable staged process in which each lead needs a requirement-analysis stage regardless of source, and volume narrows at each stage.	Sales funnel; project sales (Moncrief & Marshall, 2005)	RQ1
P2	The completeness of requirement capture at the front end determines the efficiency of quotation preparation; coordination gaps between sales and technical staff produce delay and rework.	Consultative selling (Rackham, 1988); sales–technical integration (Biemans et al., 2010)	RQ2
P3	Prospects who receive timely and regular follow-up remain engaged longer through long decision cycles than those who do not.	Relationship selling (Jolson, 1997); relationship development (Dwyer et al., 1987)	RQ3
P4	The quotation is the pivotal document of the process, and organised customer records make follow-up and quotation more accurate and informed.	CRM (Payne & Frow, 2005; Reinartz et al., 2004)	RQ4
P5	Sustained relationship management, rather than transactional selling, underlies client retention and referrals in project sales.	Relationship marketing (Morgan & Hunt, 1994; Grönroos, 1994)	RQ5

6. Research Methodology

6.1 Research design

The study uses a single-case, qualitative design based on participant observation. A single case is appropriate where the aim is an in-depth, context-rich understanding of a process that cannot be separated from its setting (Yin, 2018; Eisenhardt, 1989). The case was chosen because the firm is typical of a large class of regional engineering-service SMEs and because the author had sustained access to its sales function. The approach is abductive in the sense described by Dubois and Gadde (2002): theory and observation were used together, with the propositions in Table 3 providing an initial frame that was refined as the process became better understood.

Case-study evidence supports analytic rather than statistical generalisation (Flyvbjerg, 2006). The aim is therefore not to estimate how many Indian HVAC firms behave in a certain way, but to show how a process works in one firm, whether it is consistent with theory, and what questions it raises for broader testing.

6.2 Data sources

Three sources were used, summarised in Table 4. The author took part in the firm's sales-support activities from 15 June to 16 August 2026, working under supervision with the sales team. The tasks included recording customer requirements, coordinating with technical and execution staff, helping to compile quotation inputs, updating customer records, helping to organise lead information and following up with prospective and existing customers. A fortnightly learning diary was maintained throughout the period as required by the author's institution, and informal conversations with sales and technical staff were used to understand the reasons for particular practices. The firm's company catalogue was used as the principal documentary source for company information.



Table 4. *Data sources and how they were used*

Source	Description	Use in the analysis
Participant observation	Direct involvement in sales-support tasks over about nine weeks	Process mapping; identification of frictions; Sections 8–9
Informal discussions	Conversations with sales and technical staff on the rationale for practices	Interpreting why practices existed; checking the process maps
Fortnightly learning diary	Contemporaneous notes on activities and observations	Maintaining the chronology of observations
Company catalogue	Printed catalogue describing products, services, clients and positioning	Case description (Section 7); triangulating product and service descriptions
Published industry and academic sources	Market reports, regulatory sources, journal articles and books	Industry context (Section 3); literature (Section 4); discussion (Section 10)

6.3 Analysis procedure

The analysis proceeded in three steps. First, the recurring workflows in which the author participated were reconstructed as four process maps: the lead pathway, the requirement-to-quotation pathway, the sales–technical interface and the relationship pathway. Second, the observations associated with each stage were compared with the propositions and with the relevant literature, in the manner of pattern-matching described by Yin (2018). Third, observations that interrupted a smooth flow were grouped as process frictions, and each was linked to a practical remedy. Because the study is based on a single observer, the analysis is interpretive, and the findings are expressed with corresponding caution ("appeared to", "was consistent with") rather than as measured results.

6.4 Trustworthiness

Following Lincoln and Guba (1985), the study attends to credibility, transferability, dependability and confirmability. Credibility was supported by prolonged engagement and by cross-checking the process maps against the explanations given by staff. Transferability is addressed by giving enough description of the firm and its context (Section 7) for readers to judge applicability to other settings. Dependability is supported by the use of a contemporaneous diary, and confirmability by distinguishing throughout between what was observed, what is taken from the company catalogue, and what comes from published sources. The most serious threat to credibility is the author's dual role as participant and observer, which is discussed under limitations.

6.5 Ethical considerations and data restrictions

The firm did not disclose figures on lead volumes, quotations, conversion, order values or revenue, and none have been estimated. Individual customers are not identified; clients are described by sector only. No customer-specific commercial terms are reported. The templates in Appendix A contain only placeholder entries and are not extracts of company records.

7. The Case Organisation

7.1 Profile

Arati Insulation was established in 1983 and, according to its catalogue, has completed more than forty years of operation. Leadership passed from the founder to his son, who is the current proprietor. The catalogue also describes a related entity, established in 2010, through which the group offers turnkey HVAC project services from design to commissioning. The firm is a member of the Indian Society of Heating, Refrigerating and Air Conditioning Engineers (ISHRAE) and states that it employs over 65 skilled and trained staff for servicing and installation. It does not appear to



be a listed company. Table 5 summarises the profile; the catalogue is the source for all entries, and the staffing and experience claims are the firm's own and were not independently verified.

Table 5. *Profile of the case firm*

Attribute	Detail (as stated in the company catalogue)
Established	1983
Location	Chhatrapati Sambhajinagar (Aurangabad), Maharashtra; manufacturing workshop in the Shendra MIDC industrial area
Ownership	Family-run proprietorship; not publicly listed
Business	HVAC duct manufacturing; hot and cold insulation; cladding; HVAC installation services
Professional membership	ISHRAE
Workforce	Over 65 skilled and trained staff (firm's claim)
Marketing approach	Relationship- and reputation-based; catalogue as primary collateral; no evidence of a structured digital marketing programme
Sales records	Spreadsheet and telephone based; no dedicated CRM software observed

7.2 Products and services

The firm fabricates five main duct types and offers a range of installation and insulation services. Table 6 lists them. The combination of in-house fabrication with installation, insulation, testing and commissioning gives the firm a turnkey capability, and it also extends its contact with a customer across several stages and several years. Chiller tube cleaning, for example, is a maintenance service that keeps the firm in touch with a client long after installation, which is consistent with a relationship-oriented model of selling.

Table 6. *Product and service portfolio*

Line	Description (as per catalogue)
TDF flange duct	Duct connection system using roll-formed flange profiles at both ends, secured with bolts; available in GI, insulated GI, aluminium and stainless steel
Spiral round duct	Cylindrical duct with spiral-seam construction; GI, insulated GI and double-wall variants
Spiral flat-oval duct	Flattened-oval spiral duct offering space advantages over standard shapes
C and S flange duct	Duct fabricated with C-cleats and S-cleats, typically 24–26 gauge, for smaller low-pressure systems
MS duct	GI duct with additional mild-steel angle flanges for rigidity and low leakage
Installation services	Ducting work, HVAC unit installation, all-type HVAC installation
Insulation and cladding	Hot and cold insulation, tank and pipeline insulation and cladding, duct acoustic insulation, underdeck insulation
Specialist services	Clean-room works; chiller tube cleaning



7.3 Clients

The catalogue lists clients in two groups. Industrial clients include pharmaceutical manufacturers, engineering and industrial firms, and paints and chemicals producers. Commercial clients include hospitals, hotels, an educational institute and organised retail. Named clients are not reproduced here. The significance of this mix, as shown in Table 7, is that most of these sectors treat air quality and temperature control as operational requirements, not as comfort extras. Pharmaceutical production depends on controlled environments, hospitals on hygiene and air handling, and hotels and retailers on customer comfort. Clients in such sectors are likely to weigh reliability, documented experience and responsiveness heavily, and to be sensitive to the cost of delay.

Table 7. *Client sectors and the role of HVAC in each*

Client sector	Role of HVAC and insulation in the client's operations
Pharmaceuticals	Controlled environments and clean-room conditions are operational and regulatory requirements
Healthcare	Air quality and hygiene are central to service delivery
Hospitality	Guest comfort influences customer experience
Organised retail	Comfort and energy cost across large floor areas
Industrial and engineering	Process conditions, worker comfort and equipment protection

7.4 Strengths, weaknesses, opportunities and threats

Table 8 condenses a SWOT assessment built from the catalogue and the industry context. It is intentionally brief. Its value for this paper is that it locates the sales function within the firm's strategic position: the strengths (reputation, in-house manufacturing, turnkey scope) are assets that only produce revenue if enquiries are converted, and the weaknesses (small scale, limited visibility beyond existing networks, absence of digital sales infrastructure) are precisely the areas where the process improvements discussed later would help.

Table 8. *SWOT summary for the case firm*

Dimension	Summary
Strengths	More than 40 years of operation; in-house duct manufacturing; turnkey scope from fabrication to commissioning; diverse clients in quality-sensitive sectors; ISHRAE membership; skilled workforce
Weaknesses	Regional proprietorship scale; limited visibility outside existing networks; dependence on a small leadership group; no evidence of digital CRM or structured pipeline reporting
Opportunities	Growing demand from rising temperatures, urbanisation and industrial expansion; energy-efficiency norms favouring quality insulation; preference for single-vendor turnkey delivery; extension into clean-room and similar high-specification work
Threats	Price competition from smaller fabricators; steel and aluminium price volatility; scarcity of skilled labour; slowdown in industrial capital expenditure

No formal vision or mission statement, financial statements, CSR policy or governance framework was available. The firm's tagline and catalogue language emphasise reliable, timely and energy-efficient solutions; this is treated as an implicit value statement and not as a documented strategy.

8. Data Analysis and Interpretation

As explained in Section 6, the analysis is qualitative and process-based. It follows the five objectives in order. Where figures would normally be expected, such as conversion rates, none are given, and the statements that follow about patterns in the pipeline reflect what was visible to the author, not measured performance.

8.1 The sales process (O1, RQ1)

Four recurring workflows were identified. Figure 2 presents them as process maps. They were practised informally at the firm, without a documented procedure; the maps are the author's reconstruction.

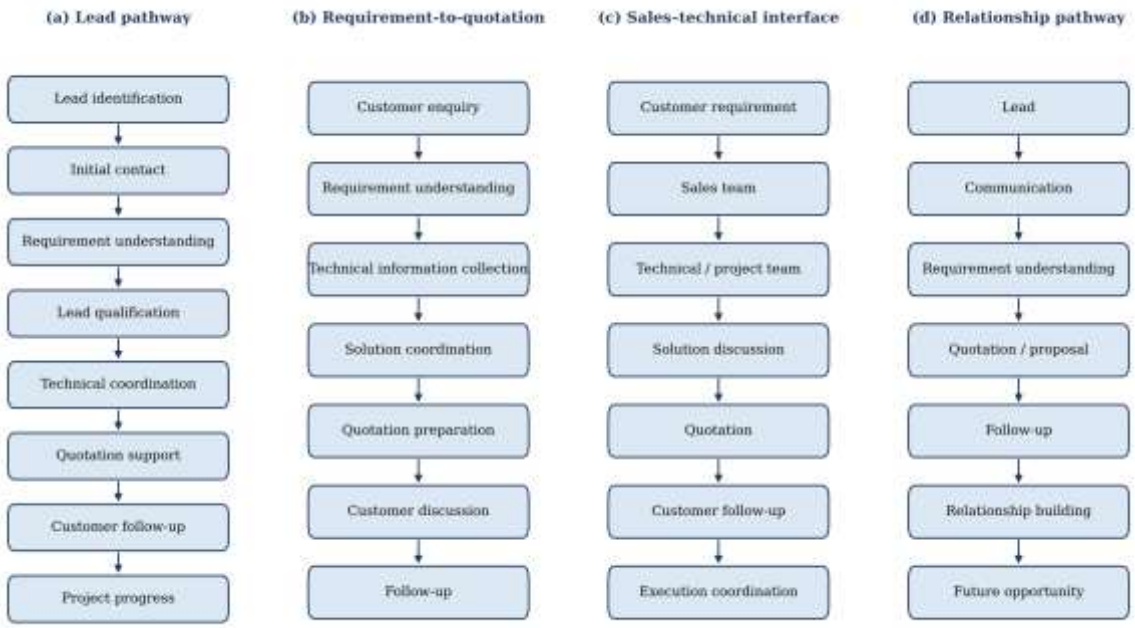


Figure 2. *Four recurring workflows in the case firm's sales function: (a) lead pathway, (b) requirement-to-quotation, (c) sales–technical interface and (d) relationship pathway*

Leads came from three broad channels: referrals from existing clients, direct enquiries from customers planning new or refurbished facilities, and contacts made through professional networks such as ISHRAE. Whatever the source, every lead had to pass through a requirement-understanding stage before a quotation could be prepared, because the work is specified for each site. Not every lead reached every stage. Some ended after initial contact or after requirements were clarified, and not every quotation resulted in an order. This narrowing is what the funnel model predicts. The author was not given figures to quantify it, but it was evident from the volume of enquiries in progress relative to the quotations and orders that followed.

Table 9 and Figure 3 map the generic funnel stages to the firm's practice. The intern's involvement was concentrated in the middle of the funnel, from qualification to follow-up, and in relationship maintenance at the bottom.



Table 9. *Funnel stages applied to the case firm*

Stage	Manifestation at the firm	Degree of formalisation observed
Lead generation	Referral, direct enquiry or professional network contact	Informal; no systematic source tracking observed
Qualification	Sales staff judge whether an enquiry is a genuine near-term project (timeline, budget readiness, authority)	Experience-based judgement
Needs analysis	Discussion of facility type, area, existing set-up and special needs such as clean-room or acoustic requirements	Conversation-led; notes varied in completeness
Solutioning	Technical and fabrication staff assess feasibility and specification	Dependent on hand-off from sales
Quotation	Scope, materials and commercial terms compiled and issued	Document-based; reviewed internally
Follow-up and negotiation	Calls and messages to resolve queries, revise scope or price	Largely ad hoc and memory-based
Order and execution	Hand-over to the project team	Informal
Post-sale relationship	Continuing contact with existing clients; maintenance services	Informal; goodwill-based



Figure 3. *Conceptual sales funnel for the case firm (illustrative; not based on measured lead volumes)*

8.2 Requirement capture and sales–technical coordination (O2, RQ2)

Requirement capture was the point at which most downstream outcomes were determined. When the initial notes were complete, covering facility type, approximate area, existing HVAC set-up, timeline and special considerations, the technical team could respond quickly and the quotation required few revisions. When they were incomplete or ambiguous, the result was a series of clarifying questions, delay, and sometimes a return visit or call to the customer. Customers frequently described needs in general terms rather than in technical specifications, so that part of the task was translation: turning a statement such as “we need ventilation for the new unit” into the information the fabrication team needed.



The coordination between sales and technical staff was equally consequential. Because the offering is customised, no project enquiry could skip the technical review. Where requirement notes were confirmed in writing before being passed on, and receipt was acknowledged, quotations and customer responses moved faster. Where information had to be re-clarified between teams, delay followed. This is consistent with proposition P2, and with the broader point in the integration literature that cross-functional hand-offs have to be designed (Biemans et al., 2010; Homburg et al., 2008). It is also consistent with the consultative-selling view that questioning is a skill: the more structured the questions asked about the customer's situation, problems and priorities (Rackham, 1988), the less rework occurred.

8.3 Lead handling and follow-up (O3, RQ3)

Customers who were contacted at reasonably regular intervals after a quotation tended to remain engaged: they asked clarifying questions, shared decision timelines, or indicated what would change their view. Customers who were not followed up promptly were more likely to go quiet. Given the long decision cycles typical of project purchases, a lapse in follow-up carried the risk that the customer's attention would move to a competing vendor, particularly as buyers in this industry often solicit several quotations. This observation is consistent with P3 and with the view that relationship development requires continuing contact during the exploration phase (Dwyer et al., 1987).

Two aspects of lead handling stand out. First, the main difficulty was not generating leads but keeping track of which customer required what action and when. With many conversations at different stages, there was a real possibility of a follow-up being missed. Second, the firm relied on the judgement of experienced staff to distinguish serious enquiries from exploratory ones, using cues such as timeline, budget readiness and decision authority. This judgement worked, but it was tacit and unrecorded, so that it could not easily be passed on to new staff or audited.

8.4 The quotation and customer records (O4, RQ4)

The quotation was the pivotal document in the process. It is the point at which the customer's requirement became a technical and commercial commitment by the firm. Compiling it required matching what the customer asked for with what the technical team could deliver within cost and time constraints. Errors or omissions at this stage, such as missing scope items, created rework and, potentially, a loss of credibility with the customer. The sector context in Section 3 adds a further complication: with steel and aluminium prices varying, quotations need clear validity periods and, where appropriate, escalation terms.

Records supported this stage. Where the enquiry history, earlier discussions and current status were captured in the sales team's records, follow-up conversations could be specific and informed, which appeared to create a better impression than generic, unprepared contact. Records were, however, kept in spreadsheets and individual notes rather than in a shared structured system. This is a typical feature of SMEs and it works at low volume, but it becomes fragile as the number of concurrent enquiries rises, and it is the weakness that the CRM literature would predict (Payne & Frow, 2005).

8.5 Relationship management (O5, RQ5)

The firm's long-standing and diversified client base, as reflected in its catalogue, appeared to be closely tied to continued relationship management rather than one-off selling. Even where an enquiry did not immediately become an order, maintaining a responsive and courteous relationship appeared to keep open the possibility of future work or referrals. The service lines noted in Section 7.2, especially maintenance, extend the relationship beyond installation. This is consistent with P5 and with the commitment-trust account of relationship marketing (Morgan & Hunt, 1994). It should be noted, however, that this observation is an inference from limited exposure. The author did not observe the long-term outcomes of individual client relationships, and there was no formal customer survey.

8.6 Process frictions

Reading across the five objectives, six recurring frictions were identified. They are listed in Table 10, together with the manifestation observed and its implication. Some of the frictions arose from the author's own position as a newcomer without technical training, and this is reflected in the entries: the technical vocabulary barrier, for instance, is a real feature of sales–technical interaction in this industry, and not only of an inexperienced participant, since any new salesperson or non-technical staff member would face it.



Table 10. *Process frictions and their implications*

Friction	Manifestation	Implication
Incomplete requirement capture	Customers state needs in general terms; notes vary in completeness	Clarification loops, delay and rework before quotation
Sales–technical hand-off gaps	Requirements re-clarified between teams, especially when many enquiries were active	Slower quotation; risk of inaccurate scope
Untracked follow-up	Many conversations at different stages; next action held in memory	Risk of leads going cold through unintended lapses
Long, opaque decision cycles	Weeks or months between quotation and decision; few visible signals	Difficulty judging whether a lead is progressing or stalled
Tacit lead qualification	Serious versus exploratory enquiries distinguished by experience	Attention diluted across low-priority enquiries; practice hard to transfer
Technical vocabulary barrier	Duct types, insulation and cladding terminology	Dependence on technical colleagues; slower requirement conversations

The frictions in Table 10 are linked: incomplete requirement capture feeds hand-off problems, and untracked follow-up is more likely when decision cycles are long. This interconnection is why the remedies proposed in Section 11 are designed as a small set of mutually supporting routines, not as separate fixes.

9. Results and Findings

9.1 Summary of findings

Table 11 sets the main findings against the propositions and the evidence that supports each. Four are rated as consistent with the proposition on the evidence available, and one, the retention link in P5, is rated as only partly assessable because the author could not observe the long-term outcomes of individual relationships.



Table 11. *Findings against the propositions*

No.	Finding	Basis	Assessment
F1 (P1)	Enquiries follow a recognisable funnel: lead, requirement analysis, solutioning, quotation, follow-up, order. Every lead needs requirement analysis, and volume narrows at each stage.	Participant observation; process mapping (Figure 2)	Consistent; no volumes measured
F2 (P2)	Completeness of requirement capture and clarity of the sales–technical hand-off affect how quickly and accurately quotations are produced.	Repeated observation across enquiries	Consistent
F3 (P3)	Prospects followed up regularly tended to remain engaged; lapses created a risk of loss to competitors. The main difficulty was tracking, not generating, leads.	Observation; staff discussion	Consistent; not quantified
F4 (P4)	The quotation is the pivotal document; organised records enabled more informed follow-up. Records were spreadsheet- and memory-based.	Observation of quotation support and record keeping	Consistent
F5 (P5)	Client retention and referrals appeared tied to sustained relationship management, with maintenance services extending the relationship.	Catalogue evidence; limited observation	Partly assessable

9.2 Observed influences on the customer's choice of vendor

No customer survey was carried out, so the factors in Table 12 should be read as informed impressions, not measured determinants. They are nonetheless coherent with what the literature leads one to expect. Reputation and sector experience reduce perceived risk for institutional buyers; turnkey capability reduces the buyer's coordination burden; and responsiveness and clear quotations signal competence in the early stages of a relationship, when the buyer has little other evidence on which to judge (Ulaga & Eggert, 2006).



Table 12. *Observed factors influencing vendor choice (qualitative)*

Factor	Observation
Track record	Over 40 years of operation and existing client references appeared to build early credibility with new prospects
Turnkey capability	Customers seeking one vendor for fabrication, installation and commissioning viewed the integrated offer favourably
Responsiveness and follow-up	Prompt responses and regular follow-up appeared to improve engagement
Quotation clarity	Complete quotations that matched the stated requirement reduced back-and-forth
Sector experience	For pharmaceutical and healthcare buyers, prior work on similar facilities (for example, clean rooms) appeared to reassure

9.3 Overall result

Taken together, the evidence suggests that in a technically specialised project-sales environment, sales performance is determined less by the volume of prospecting than by four disciplines: the quality of requirement capture, the discipline of follow-up, the smoothness of sales–technical coordination and the strength of long-term relationships. This answers RQ1 to RQ5 in outline. The enquiry process follows a funnel (RQ1); requirement quality and hand-off determine quotation efficiency (RQ2); follow-up keeps prospects engaged (RQ3); the quotation and the customer record are the central instruments (RQ4); and relationship management appears to underpin retention (RQ5). Whether these disciplines are in fact decisive for conversion is a question for later quantitative work, as discussed in Section 13.

10. Discussion

10.1 Funnel structure under informal management

The finding that enquiries pass through a staged, narrowing process is unsurprising, and it is consistent with the long-standing step-wise view of selling (Moncrief & Marshall, 2005). What the case adds is evidence of how that structure is enacted when it is not formally managed. The firm's stages exist in practice but are not defined, measured or reported. The consequence is that the funnel works as a mental model and not as a management tool, and the benefits that the literature attributes to funnel thinking, namely visibility of where prospects are lost and a basis for prioritisation, are only partly realised. This matters because buyer power in the firm's niche is high (Table 2): a small firm that cannot see its own pipeline cannot easily decide where to put scarce attention.

10.2 Requirement capture as the pivotal skill

The strong connection observed between requirement completeness and quotation efficiency supports the case for consultative selling in made-to-order industries (Rackham, 1988; Weitz & Bradford, 1999). One implication is that the "consultative" label should not be reserved for sales of high value or complexity in the abstract; in the firm studied, it is a practical necessity, because an inadequately understood requirement results in a wrongly specified and wrongly priced product. A second implication is that requirement capture is a documentable skill. The fields that experienced staff asked about, such as facility type, area, existing system, timeline and special conditions, could be written down as a checklist (Appendix A, Table A2), which turns tacit competence into a shared routine.

10.3 The sales–technical interface

The literature on integration mostly examines the marketing–sales boundary (Homburg et al., 2008; Biemans et al., 2010). In the firm studied, the more consequential boundary was between sales and technical staff, and the evidence suggests that the same principle holds: integration did not happen by default, and it depended on explicit hand-offs and confirmations. Because the intern's role included relaying information in both directions, the case provided a useful vantage point on this boundary, though it also means that the observations may overstate the extent to which a more



established employee would encounter such frictions. A tentative conclusion is that, for made-to-order firms, the sales–technical hand-off deserves the same research attention as the marketing–sales interface.

10.4 Follow-up, records and the limits of informal CRM

The difficulty observed in the firm was not an absence of CRM thinking but the absence of a mechanism to ensure that it was applied consistently. The firm already understood the value of staying in touch, and relied on this in its relationship-based growth. What was missing was a shared record of which action was due, when and by whom. This is consistent with the view that CRM is as much about information management and process as about software (Payne & Frow, 2005; Zablah et al., 2004). It also suggests a pragmatic reading of the SME CRM problem: before investing in a system, a firm can capture most of the value with a disciplined, shared spreadsheet, provided that the fields and review routines are defined.

10.5 Relationship capital as a competitive asset

The observations on relationship management are consistent with the commitment-trust account (Morgan & Hunt, 1994) and with evidence that buyers value service support and supplier know-how beyond the product itself (Ulaga & Eggert, 2006). The firm's clients are concentrated in sectors where failure is costly, so the reputational value of reliable delivery is high. At the same time, the firm's reliance on reputation and referrals is a double-edged strategy. It protects against price competition but leaves the firm exposed if its process fails to keep up with growth, since a missed follow-up or a wrong quotation damages the very asset on which the firm depends. This tension, between a model that depends on relationship quality and processes that are informal, is the central finding of the paper.

10.6 Relation to the industry context

The sector analysis indicates sustained demand growth but also high buyer power and intense rivalry. Together, these suggest that market growth alone will not secure a regional firm's position: a larger pool of enquiries will only help if the firm can respond to them consistently. In this sense, the process improvements discussed below are not merely operational tidying; they are a way of converting a favourable market into realised orders without sacrificing the reputation on which the firm rests.

11. Practical and Managerial Implications and Recommendations

11.1 Implications for managers of small project-based firms

For owner-managers of firms like the case firm, the findings point to four practical conclusions. First, treat requirement capture as a skill to be standardised, not left to individual style. Second, make the sales–technical hand-off explicit, with a written note and an acknowledgement. Third, give every active enquiry a reference, a status and a next-action date in a record that everyone can see. Fourth, collect feedback on outcomes, including lost quotations, because it is the cheapest available source of evidence on why customers choose or reject the firm. None of these requires specialist software or significant expenditure.

11.2 Recommendations for the case firm

Table 13 sets out five recommendations. Each is tied to a finding and states how it could be implemented, the expected benefit and a measure by which its effect could later be judged. The measures are suggested indicators; the firm would need to decide whether and how to record them.



Table 13. *Recommendations, implementation and indicators*

Recommendation (finding)	How to implement	Expected benefit	Possible indicator
R1. Structured lead tracking (F1, F3)	Give each enquiry a unique reference; record source, requirement summary, status and next action in a shared register (Appendix A, Table A1); review at a short regular team meeting	Fewer forgotten or duplicated enquiries; visible pipeline; basis for prioritisation	Share of enquiries with a recorded next action; enquiry-to-quotation ratio
R2. Regular follow-up schedule (F3)	Define follow-up intervals by stage (initial enquiry, after quotation, after revision); record the next date for every active enquiry	Fewer prospects lost through unintended lapses	Share of quotations followed up within the agreed interval
R3. Single customer database (F4)	Consolidate contacts, enquiry history and project status in one spreadsheet or low-cost CRM tool	More informed follow-up; continuity when staff change	Completeness of customer records; time to retrieve history
R4. Standard sales–technical hand-off (F2)	Use a short written requirement note (Appendix A, Table A2) with a recorded acknowledgement before quotation drafting	Fewer clarification loops and scope errors	Quotation turnaround time; number of quotations revised for scope omissions
R5. Outcome feedback (F5)	After an order or a declined quotation, hold a brief structured conversation and log the reasons	Evidence on why the firm wins or loses; input for pricing and process	Share of closed enquiries with a recorded reason

The recommendations are intentionally sequenced by effort. R1 and R2 can be implemented immediately with existing tools. R3 builds on them. R4 requires agreement between sales and technical staff. R5 depends on the firm's willingness to ask for candid feedback, which the relationship model makes feasible. The firm should treat the first quarter after implementation as a trial and compare the indicators before and after, but the paper does not make any claim about expected size of effect.

11.3 Implications for practitioners and educators beyond the firm

Trade associations and industry bodies, such as the professional society to which the firm belongs, could develop shared, minimal templates for small members, since the weaknesses seen here are probably common. For management educators, the case illustrates that standard sales frameworks need translating for small engineering firms: the funnel, consultative selling and CRM remain valid, but their implementation takes the form of checklists and shared registers, not enterprise systems.

12. Limitations of the Study

Several limitations should be borne in mind when interpreting the findings.

- **Single case and single function.** The evidence is drawn from one firm and from its sales function only. The findings cannot be generalised statistically to other firms or to functions such as production or finance.



- **Short observation period.** About nine weeks is short relative to project sales cycles that can run for months. Many of the enquiries observed had not reached an outcome when observation ended, so conclusions about conversion and long-term retention are limited.
- **No quantitative data.** The firm did not release figures on leads, quotations, conversion, order values or revenue. The analysis is therefore qualitative; claims that follow-up or requirement quality "improve" outcomes are impressions from observation and not measured effects.
- **Participant-observer bias.** The author both took part in and described the processes. The author's junior status and lack of technical training may have affected what was seen and how it was interpreted. The use of staff explanations and a contemporaneous diary reduces, but does not remove, this risk.
- **Reliance on company-supplied information.** Company information comes mainly from the firm's catalogue, which is promotional. Claims such as staff numbers and years of operation were not independently audited, and no financial information was available.
- **Secondary market data.** Market-size estimates come from commercial research publishers whose methods could not be examined, and the estimates differ widely (Table 1).
- **No customer perspective.** No customers were interviewed or surveyed, so the factors affecting vendor choice reflect the seller's view only.

13. Future Research Scope

The findings suggest several directions. A longitudinal study that follows a cohort of enquiries from first contact to outcome would allow the funnel, follow-up and quotation propositions to be tested with real conversion data, if a firm were willing to share anonymised records. A comparative multiple-case design across firms of different size and CRM maturity could examine whether formal tracking changes outcomes. Interviews or a survey of buyers, such as facility managers, consultants and procurement staff, would add the buyer's perspective on vendor selection and test the factors suggested in Table 12. A before-and-after evaluation of the recommendations in Table 13, using the indicators proposed there, would show whether lightweight process discipline measurably improves quotation turnaround and follow-up consistency. Finally, the sales–technical hand-off in made-to-order firms deserves more attention in the integration literature, and a study that measures it directly would be a useful extension.

14. Conclusion

This paper has examined how the B2B sales process works in a small, relationship-driven HVAC ductwork and insulation firm, using a participant-observation case study read against theory on organisational buying, consultative selling, the sales–technical interface, CRM and relationship marketing. The process followed a recognisable funnel, but it was run informally. Requirement capture and the sales–technical hand-off were the points on which quotation efficiency most depended; follow-up discipline appeared to determine whether prospects stayed engaged through long decision cycles; the quotation and the customer record were central instruments; and relationship management appeared to underlie the firm's ability to retain clients and attract referrals.

The central tension identified is between a commercial model that depends on trust and reliability and a set of internal routines that are informal and held largely in memory. In a growing market with powerful buyers, that tension is likely to sharpen. The remedies proposed, namely a shared enquiry register, defined follow-up intervals, a single customer record, a written sales–technical hand-off and structured outcome feedback, are modest and inexpensive, and they follow directly from the evidence.

The study's limits are real: one firm, nine weeks, no performance data and a single observer. Its findings should therefore be read as theoretically informed propositions for testing and not as established results. Within those limits, the paper offers a documented process model, a set of testable propositions, a practical improvement agenda and reusable templates for small project-based firms, and it identifies a clear programme of further research.



Declarations

Author contributions: [to be completed by the author]. **Funding:** [none / to be completed]. **Conflict of interest:** [to be completed; the author's relationship with the case firm should be disclosed]. **Ethics and permissions:** The author took part in the firm's sales-support activities as a trainee. [Confirm that the firm has agreed to be named, that use of the catalogue content is permitted, and whether the author's institution requires ethics clearance.] **Data availability:** The firm did not release quantitative sales data; no such data are reported. Observation notes are held by the author [confirm whether they may be shared in anonymised form].

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Appendix A. Illustrative Record-Keeping Templates

The templates below are proposed instruments. They are not extracts from the firm's records, and the entries shown are placeholders or generic examples only.

Table A1. *Enquiry and follow-up register (proposed)*

Ref.	Source	Enquiry type	Requirement summary	Status	Next action	Due date
[ID]	Referral	Ducting	New facility ducting requirement	In discussion	[Action]	[Date]
[ID]	Direct enquiry	Insulation	Pipeline insulation for plant	Quotation shared	[Action]	[Date]
[ID]	Professional network	HVAC installation	Office HVAC upgrade	Requirement understanding	[Action]	[Date]

Note. Suggested status values: new, requirement understanding, with technical team, quotation shared, revised quotation, order received, closed – lost, closed – on hold. Add columns for last contact date and contact mode if follow-up is logged in the same sheet.

Table A2. *Requirement capture checklist for the sales–technical hand-off (proposed)*

Field	Details to be captured
Customer and contact	Organisation, contact person and role, decision-maker if different
Site and project	Location, project name, stage of construction or refurbishment
Type of facility	For example industrial plant, hospital, hotel, office, pharmaceutical unit
Nature of requirement	New ducting, insulation, installation, servicing, or a combination
Approximate scope	Area or length, number of units, materials preferred
Existing HVAC set-up	Present system and constraints, if any
Timeline	Required start, completion and any milestone dependencies
Special conditions	Clean-room, acoustic, hot or cold insulation, cladding or access limits
Hand-off record	Date passed to technical team; acknowledged by; clarifications requested

Table A3. *Quotation tracker (proposed)*

Ref.	Quotation no.	Customer / project	Date issued	Scope summary	Status
[ID]	[No.]	[Project]	[Date]	Duct fabrication and installation	Awaiting feedback
[ID]	[No.]	[Project]	[Date]	Pipeline insulation and cladding	Revised quotation sent

Note. Recommended additional fields: quotation validity date, price-escalation clause (yes/no), and reason recorded if lost.