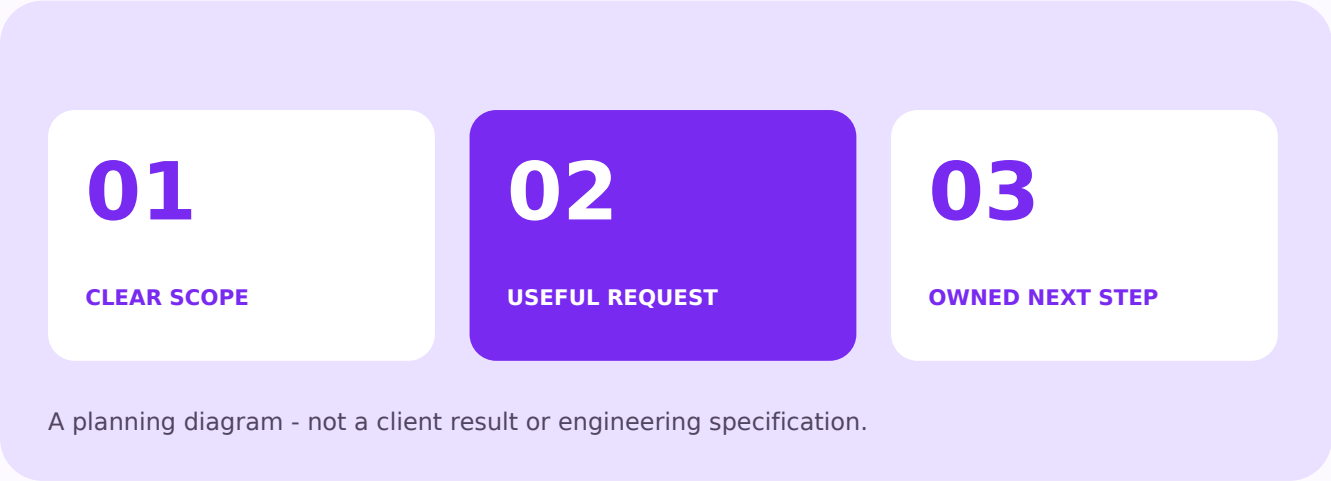
A clearer request. A more useful next step.

From capability page to usable RFQ: a manufacturing intake workbook.

A practical working guide for defining quotation-ready enquiries, designing a staged intake and handing complete context to the right technical reviewer.



A planning diagram - not a client result or engineering specification.

HOW TO USE THIS GUIDE

Work through one capability with marketing, technical and commercial owners. Fill the prompts using your own business rules. Examples are illustrative; no lead volume or commercial result is promised.

Full text is also available in the responsive HTML reader. PDF text is selectable; headings are available in the document bookmarks.

01 / Define the decision the enquiry should unlock.

This workbook helps a manufacturer design an enquiry-to-quotation handoff. It is a planning guide, not an engineering specification or a forecast of sales. Complete it with the people responsible for technical feasibility, commercial review, website content and customer communication. Use synthetic examples while testing the workflow.

Start with one capability and one customer task. A broad request for industrial solutions gives the follow-up team little basis for a decision. A focused request for a material, process and intended application can support an initial feasibility review. Keep the first decision smaller than a final quotation if important specifications remain unknown.

- Capability in scope: ____; applications intentionally excluded: ____.
- First decision to make: feasibility / clarification / quotation / referral.
- Decision owner: ____; backup owner: ____; review date: ____.

02 / Make a fit definition the team can apply.

Define what makes an enquiry suitable for this capability. Consider application, geography, material, quantity band and the information needed for a preliminary discussion. Separate a confirmed restriction from a preference. A preferred order size should not be presented as a mandatory minimum unless the business has decided that it is.

Create three outcomes for initial review: ready for technical assessment, needs clarification and outside current scope. Avoid a vague quality score that nobody can explain. A small company with an early prototype might be a relevant prospect even when its first enquiry is incomplete.

- Ready means these facts are known: ____.
- Clarification is needed when: ____; outside scope means: ____.
- A human may override the initial classification because: ____.

03 / Build a field dictionary before building a form.

For each proposed field, write its purpose, expected format, whether it is required now and who uses it. A field without a decision attached is a candidate for removal. The first enquiry might need a service interest and broad requirements, while a later technical stage collects the detailed drawing or revision history.

Illustrative field dictionary: material helps route the request to the appropriate specialist; quantity band helps prepare a commercial discussion; application helps identify a relevant process; preferred contact method allows a response. These are prompts to adapt, not universal mandatory fields for every manufacturer.

- Field: ____; decision supported: ____; required at which stage: ____.
- Allowed unknown response: ____; validation example: ____.
- Person who actually uses this answer: ____; retention owner: ____.

04 / Publish a capability page that sets expectations.

Write a page that explains the relevant process, supported applications, meaningful constraints and the next step. Give the visitor enough information to decide whether to enquire. Clearly distinguish a general capability from a project-specific commitment that requires technical approval.

For search discovery, Google's snippet guidance supports accurate page content and descriptive summaries; it does not provide a guaranteed way to dictate the displayed search description. Use clear public explanations rather than repeating a list of industry keywords. Label illustrative diagrams and examples so they are not mistaken for delivered client work.

- Opening answer: we help ____ evaluate ____ by ____.
- Evidence we can substantiate: ____; claims requiring review: ____.
- Next step and information needed from the visitor: ____.

05 / Design a staged intake with an unknown path.

Let people explain an uncertain requirement without forcing an inaccurate dropdown answer. Provide a clear other option and a short text field when a category does not fit. Keep instructions close to fields and explain what will happen after submission. Do not imply that a submitted request is already accepted for production.

Ask for contact details proportionate to the next step. Avoid collecting confidential technical material through a general enquiry form by default. If detailed files are genuinely required, agree a controlled upload and access process separately, including who can read the material and how the customer should identify the correct version.

- First-stage fields: ____; deferred technical fields: ____.
- Unknown/other path and routing owner: ____.
- Acknowledgement wording approved by the team: ____.

06 / Create a handoff record that survives team changes.

Choose a stable enquiry identifier and a status vocabulary. Suggested working statuses are received, awaiting clarification, technical review, commercial review, quote sent and closed. Adapt them to the actual process, with a short definition for entering and leaving each stage. Do not change original answers when adding internal status notes.

Name the owner of the next action and its due date. A shared inbox alone does not establish responsibility. Keep an audit trail of status changes in a suitable private system, while restricting confidential files to the people who need them. The public website should never expose enquiry records or uploaded specifications.

- Record ID: ____; received time: ____; source if known: ____.
- Current stage: ____; next action: ____; assigned owner: ____.
- Clarification question sent: ____; due date: ____; result: ____.

07 / Work through one illustrative request.

Illustrative example, not an AdzUp client result: a buyer requests an injection-moulded component, gives an estimated quantity band and describes its application, but has not provided a material grade or drawing revision. The intake should preserve the stated facts, mark the missing facts and route the request for clarification. It should not infer tolerances or promise a delivery date.

A useful next action is a short request for the missing information through the agreed channel. Record who will assess it and when the buyer should expect a response. If the application is outside current capability, provide an accurate closure explanation rather than leaving the record permanently labelled new.

- Known facts in this example: process, broad application and estimated quantity.
- Unknown facts: material grade, approved revision and any necessary acceptance requirements.
- Your own synthetic test request: ____; expected route and response: ____.

08 / Measure the stages without treating every form as revenue.

Use separate counts for received enquiries, contactable requests, suitable technical reviews, quotations and accepted orders. Report the cohort and period consistently. An enquiry received this week may take longer to become an order, so comparing this week's clicks directly to this week's order count can create a misleading narrative.

Google's Performance Max lead-generation guidance emphasises meaningful conversion inputs. That platform background does not dictate your manufacturing qualification rules. Establish the business definitions first, then decide whether a reviewed, permitted advertising integration can use a suitable downstream outcome. Do not upload technical files or free-text requirements as analytics event parameters.

- Metric: ____; exact qualifying event: ____; duplicate rule: ____.
- Reporting cohort: ____; observation window: ____; open cases: ____.
- Source unknown is reported as unknown, with the limitation documented.

09 / Run an acceptance test before inviting more traffic.

Test a complete request, an incomplete request, an unsupported application and a repeat submission. Use synthetic data and controlled files. Confirm visible validation, successful receipt, notification delivery, assigned ownership and the correct next action. Test the mobile keyboard and recovery after a failed network request.

Include privacy and access checks in acceptance. A confirmation should not expose the submitted requirements to another visitor, and a notification link should still require the intended private access. A successful button animation is not proof that the record exists in the destination system.

- Scenario: ____; expected result: ____; observed result: ____.
- Test owner and date: ____; evidence location: ____; outstanding defect: ____.
- Go / revise / stop decision and responsible approver: ____.

10 / Use a weekly review to improve one recurring handoff.

Review repeated clarification needs, unassigned records, unsupported requests and delays between stages. Choose one correctable issue at a time. The solution could be a clearer capability statement, a better field option or an internal routing change; it does not always require another campaign.

Keep the worksheet as a decision record. Revisit it when a capability changes, a new technical reviewer joins or a different geography is promoted. Retain original posting and enquiry dates instead of refreshing them to create apparent activity. The goal is a more usable request and a more accountable response, not a dashboard full of undifferentiated leads.

- Recurring issue: ____; evidence: ____; proposed change: ____.
- Owner: ____; review date: ____; acceptance check: ____.
- What we learned, including limitations: ____.

Sources and working context

Official documentation supports the factual background. The field dictionary, routing model, worksheets and examples are AdzUp editorial recommendations, not requirements imposed by the cited platforms. References reviewed 20 November 2026.

Google Search Central: Control your snippets

https://developers.google.com/search/docs/appearance/snippet

Google Ads: Performance Max best practices for lead generation

https://support.google.com/google-ads/answer/13775965

web.dev: Help users enter the right data in forms

https://web.dev/learn/forms/validation

Take the next step with AdzUp

Use the guide on your own, or bring your capability page and intake questions to AdzUp. No confidential drawings are required for an initial website discussion.

adzup.in/contact/