

Insights

🕒 EST. 7 MINUTE READING TIME

A quote's age on the dashboard says little about how the quoting desk is doing. A quote is often created well before anybody works on it – sent across from a Fergus job or a Hermes scope, then drafted by the AI – and the customer then takes as long as they take to answer. **Insights** is where *Domino* separates those clocks: how long a quote waited to be picked up, how long a person took to turn it round once they had, what the quotes were worth, what the customers said, and what the AI reviews made of them. Anyone who can open the Domino dashboard can open it, here:

- <https://eden.samconsulting.co.nz/domino/insights>

The page opens on the last twelve weeks, since an answer on a quote is usually weeks away rather than days. Pick a different period from the strip under the title (the last four weeks, this month, last month or this financial year), or set your own dates with the two date fields beside it. Clearing a date runs the period back to the first quote or through to today. The address in your browser carries the period, the people and the list you are looking at, so a filtered view can be copied and sent to somebody and they will see the same thing.

What Counts as Published

A quote counts as published the first time it is sent to Fergus. A quote with no Fergus job counts from the first time it leaves Draft, and that history only started when Insights did, so a quote that was marked sent by hand before then and never went to Fergus is not counted.

Everything the page says about time, value, answers and reviews is about the quotes first published inside the period, as they stand today. A published quote is **Accepted**, **Declined**, **Withdrawn** (archived in Domino or voided in Fergus) or still **Awaiting** an answer. The acceptance rate is accepted out of accepted and declined; withdrawn quotes are left out of it, because a withdrawn quote has usually been replaced by a re-quote or a clone that gets its own answer.

The Median Quote

The band at the top of the page follows the median quote in the period, in two parts.

The first part is our time, drawn to scale in working hours (8am to 5pm on weekdays unless the office hours have been changed). **Picked up** runs from the quote being created to the first edit a person made to it, and **Quoting** runs from that first edit to the quote being published, with the wall-clock time beside it. Starting the quoting clock at the first edit means a quote the platform created on a Friday night is not counted against whoever picked it up on Monday morning. A quote that was published without anybody editing it counts from its creation, and the line under the heading says how many of those there were.

Inside the quoting bar, the darker part is the **hands-on** time: an estimate of how long somebody was working on the quote rather than how long it sat open. Edits made within 30 minutes of each other count as one sitting, and each sitting is credited another 5 minutes for the reading and thinking before its first edit. It is an estimate from edit activity, so a quote somebody spent an hour reading before changing one line will read as quicker than it was.

The second part, drawn dashed, is the customer's time: calendar days from publishing to the answer, for the quotes whose answer carries a date.

Under the band are the median and mean value of the quotes published in the period, the total published and the total won, all excluding GST and as each quote stands now, and a bar of the answers. Press a part of the bar to list those quotes.

The Counts

Under the band are eight counts, and each is a way into the list beneath it. **Created** and **Idle drafts** are about the quotes created in the period, and the rest are about the quotes published in it.

Press **Created** for every quote created in the period, whether by a person or by the platform, with how many have been picked up, and **Published** for the quotes first published in it, with their median quoting time. **Accepted**, **Declined** and **Withdrawn** list what became of them, and Declined names the most common reason where one stands out. **Awaiting answer** lists the published quotes still waiting on the customer, and its count turns amber when any of them have waited more than 14 days, which is when they are worth a chase. **Reviewed** lists the published quotes that had an AI review before they went out. **Idle drafts** lists the quotes created in the period that have not been published and have not been edited for 7 days, and its count is amber whenever there are any, because each one is a quote nobody has touched for a week.

The pressed count carries an orange rule along its top, and the list below it changes to match. Every row opens its quote and carries its status, its value, and the timing that matters for the list you are in: when it was published, how long the quoting and hands-on time were, how long it waited for an answer, and the reasons given on a declined quote.

Charts and Breakdowns

Four charts follow the list: quotes created against quotes published, the acceptance rate, the median quoting and hands-on time, and the median value, each by week (by day for a period of two weeks or less, by month for one longer than a year). On a phone they sit behind the **Charts** button.

Under the charts, **By value** splits the published quotes into value bands, with each band's bar coloured by its answers so a band that wins less than its neighbours stands out; the bands above \$30,000 follow the Builder's Fee ladder. **How they began** splits them by where the quote came from - a Fergus job, a Hermes scope, the McLaren's portal, created in Domino, or a clone - and **Why declined** counts the reasons given on the declined ones. Press any row to list its quotes.

Reviews

This section reads only the review each quote had before it was published, since a review run after a quote was declined has already seen the answer. It says how many of the published quotes were reviewed first, how many were then changed before they went out, and how the reviews were rated with the thumbs on the review panel.

The **Scores** table gives the mean scope, pricing and success likelihood score the reviews gave, overall and split between the quotes that were accepted and those that were declined. Beside it, **Likelihood against answers** groups the reviewed quotes by the success likelihood the review gave them: the bar is how many in each group were accepted, and the tick is the likelihood the review gave on average, so a well-judged group has its tick at the end of its bar. The line under it compares the reviews' Brier score with the score the business's overall acceptance rate would have got on its own. Press a group to list its quotes.

The last row, **Scope coverage**, **Prices against history** and **Findings**, adds up the evidence the reviews collected: how many scope items were priced, partly priced or missing, how many line prices sat below, within or above what the business has charged before, and the findings by kind and severity.

People

The table at the foot of the page lists everybody who built a quote published in the period - the person who made the most edits to it before it went out - with how many they published, their median quoting and hands-on time, their accepted and declined counts, acceptance rate, median value, and how many of theirs were reviewed first. Sort it from the menu beside the heading. Press a row to narrow the whole page to that person; press it again to let them go.

If a figure on the page does not match what you expected, let us know at support@samconsulting.co.nz.