SAMPLE DIAGNOSIS

Sample Windows Ltd.

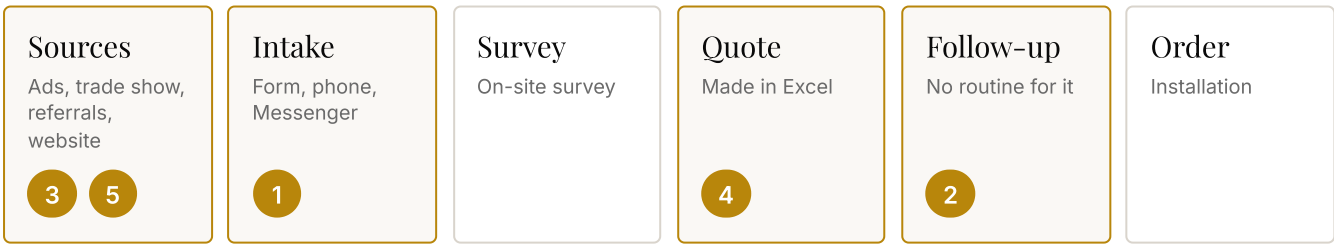
> This is a sample. Sample Windows Ltd. is an invented company, and the figures only illustrate.

The company

Activity	Sale and installation of windows and doors
Headcount	16 people, 3 of them salespeople
Source of enquiries	Google and Meta ads, trade show, referrals
Advertising budget	600 000 Ft a month
CRM	None

Summary

How an enquiry travels to an order. The numbers mark the bottlenecks, in the order in which they should be dealt with.



1. Enquiries arrive in three places, with no shared list
2. Most of the quotes sent out are not followed up
3. The advertising account does not measure which campaign brings enquiries
4. The quote is made by hand, and it takes days
5. The website does not answer the most common questions

The bottlenecks

1 Enquiries arrive in three places, with no shared list

WHAT WE SAW

The form goes to a shared email inbox, the three salespeople note phone calls in their own notebooks, and Messenger messages are answered by whoever has a moment.

WHY THE WORK GETS STUCK HERE

Nobody can say how many enquiries arrived in a month, or who is dealing with which one. Until that is known, none of the other steps can be measured.

WHAT HAS TO BE PUT IN PLACE

- A CRM where every enquiry is recorded, wherever it comes from.
- A rule on which salesperson gets an enquiry, and by when they have to call back.

Building block: **Sales and CRM**

2 Most of the quotes sent out are not followed up

WHAT WE SAW

According to the questionnaire, 38 quotes went out in September, and nobody called back on 21 of them.

WHY THE WORK GETS STUCK HERE

An enquiry that reaches the quote already has an ad, a phone call and an on-site survey behind it. Without follow-up, that work goes unanswered.

WHAT HAS TO BE PUT IN PLACE

- The quote as a separate stage in the CRM, with a call-back deadline.
- An automatic follow-up email after the quote is sent.
- A weekly list of the quotes nobody called back on.

Building block: **Sales and CRM**

3 The advertising account does not measure which campaign brings enquiries

WHAT WE SAW

In the Google Ads account, neither form submissions nor phone calls are set up as conversions. The campaigns are optimised for clicks.

WHY THE WORK GETS STUCK HERE

Of the 600 000 Ft monthly budget, nobody can say which part brings enquiries and which part does not.

WHAT HAS TO BE PUT IN PLACE

- Conversion tracking for the form and for phone calls.
- The campaign structure reorganised by product group.

Building block: **Paid advertising**

4 The quote is made by hand, and it takes days

WHAT WE SAW

The salesperson builds the quote in Excel from the survey notes. According to the questionnaire, it takes 4 working days on average from the survey to sending the quote.

WHY THE WORK GETS STUCK HERE

Every quote repeats the same steps, and the prospect waits in the meantime.

WHAT HAS TO BE PUT IN PLACE

- A quote template filled in from the survey data.
- A notification to the salesperson when a survey has been done and no quote has gone out yet.

Building block: **Operations and automation**

5 The website does not answer the most common questions

WHAT WE SAW

According to the salespeople, almost every call asks the same three questions: how much it costs, how long it takes, and what the installation includes. The website answers none of them.

WHY THE WORK GETS STUCK HERE

Part of the salespeople's time goes on the same answers, and a visitor who does not phone leaves the website without an answer.

WHAT HAS TO BE PUT IN PLACE

- A page for the three questions, linked from the product pages.
- A content calendar built from the questions the salespeople receive.

Building block: **Organic visibility**

What works

The on-site survey is carried out within a week of the enquiry.

Some of the enquiries come from referrals: clients are satisfied with the installation.

In which order

The order matters. The shared list comes first, because nothing can be measured until it exists. Quote follow-up comes next, because most of the work has already been done by that point. Ad tracking, quote-making and the website only come after that.

Which offer is closest

The closest offer to this situation is Synphos Growth Engine: there is a sales team and an advertising budget, but no system behind them. This is for guidance, not a commitment.

WHAT THIS DOCUMENT IS BASED ON

The diagnosis is based on the completed questionnaire and on the information the company provided. It promises no result: it names where the work gets stuck and what has to be put in place. This is a sample. Sample Windows Ltd. is an invented company, and the figures only illustrate.