

Diagnosis

Installation company, €14M revenue, 85 employees

Summary

Of the 140-plus numbers in your reports, five move your profit. Three improvements are together worth an estimated **€319k a year** (range €172k to €467k). Start with following up quotes: it takes the least work and shows results fastest.

How these numbers were made

Three years of transactions from the bookkeeping, the quoting system and the time registration, reconciled with the annual accounts. For each improvement a low, likely and high estimate. I share the calculations with your accountant.

Who I needed from your side

The managing director for the kick-off and the presentation, the finance assistant for the exports and one salesperson for an hour of data questions.

The five numbers that move your profit

NUMBER	NOW	TARGET	RHYTHM	OWNER
Quotes followed up within 3 days	58%	85%	weekly	sales
Quote win rate	24%	28%	monthly	commercial director
Projects more than 10% over budget	31%	15%	weekly	project leads
Receivables older than 60 days	€1.1M	€0.6M	weekly	finance
Gross margin per project	28%	30%	monthly	leadership

The three improvements

ESTIMATED VALUE PER YEAR, LIKELY: €319K COMBINED



1 · Following up quotes

Software puts every quote without a reply after 3 days on a follow-up list. Every quote gets one owner who calls. Sum: 2,000 quotes × 4 points higher win rate × €8,000 = €640k extra revenue, × 28% margin. Low 2, high 6 points.

PER YEAR

€179k

RANGE: €90K–€269K

TYPE: BOTH

2 · Project overruns

Overruns now cost about €180k of margin a year. Every Monday the project leads review their projects running over budget, and software alerts as soon as hours or materials pass the estimate by 10%. Sum: half of that, low 30%, high 70%.

PER YEAR

€90k

RANGE: €54K–€126K

TYPE: PEOPLE +

SOFTWARE

3 · Receivables

Automatic reminders on day 14, 30 and 45, plus a weekly list for finance. Sum: €500k less outstanding × 6% financing cost, plus €20k fewer bad debts. Agree with your accountant.

PER YEAR

€50k

RANGE: €28K–€72K

TYPE: SOFTWARE

What not to build, and why

A new CRM.

The current system works. Quotes go cold because nobody owns them, not because of the software.

A dashboard with forty charts.

Five numbers are enough. Every extra number makes the others worth less.

An AI assistant that writes quotes.

Writing quotes is fast enough. The leak is in the follow-up.

The rhythm

Daily

Alert for new quotes without an owner.

Weekly - Monday, 30 minutes

Follow-up, overruns and receivables on the table, each with its owner.

Monthly

Win rate and gross margin per project.

Quarterly

Review prices and estimating norms.

Next step

Build improvement 1 first. Then 2, then 3. Building usually costs between €15,000 and €40,000. The diagnosis stands on its own: what you do with it is your call.

HAD THE DIAGNOSIS FOUND NO IMPROVEMENT WORTH €9,500 A YEAR OR MORE, YOUR MONEY WOULD HAVE GONE BACK.