THE INTRODUCTORY BUSINESS AUDIT

One Week Bootstrap

Sample audit for a commercial maintenance business

12 people · Sydney · Eight-week baseline window

The first place to look

The team already gets a steady flow of enquiries. Open quotes slip out of view, and the same people who follow them up spend hours rebuilding prices and proposals. Fix the handoff first and test whether quicker quotes help the team win more of the work it already attracts.

Follow up open quotes

45% to 85%

Eligible open quotes followed up within two business days. Primary owner: sales coordinator.

Prepare quotes faster

60 to 35 mins

Average hands-on prep time per quote. Primary owner: estimating lead.

END-OF-WEEK DECISION

Approve a small pilot, gather more evidence or stop.

The Bootstrap delivers two process maps, a KPI baseline, a business case and a roadmap. Any implementation is a separate decision. We proceed only with a clear business case and your agreement. You can stop at any point.

All observations, baselines, targets and financial figures in this sample are fictional.

AUDIT SCOPE

How we spent the week

We interview the owner and the people doing the work. We follow recent jobs through the systems they already use and agree what the numbers mean.

Day	Work and evidence
Monday	Interview the owner and coordinator. Agree the growth objective and process owners.
Tuesday	Shadow the team. Trace an enquiry, a stalled quote and a won job.
Wednesday	Reconcile eight weeks of records. Time 12 comparable quotes and review exceptions.
Thursday	Review the key growth drivers. Rank changes by likely value, effort and risk.
Friday	Agree the two priorities, KPI targets and 30-, 60- and 90-day roadmap.

Key StreetSmart growth drivers

Growth driver	Sample baseline or what to measure next	Decision
Lead generation	120 qualified enquiries per four weeks. Count qualified leads by source.	Monitor
Sales conversion	20 of 80 mature quotes won (25%). Match enquiries to wins to locate earlier drop-off.	Prioritise
New customer acquisition	Count first-time wins and acquisition cost per new customer by source.	Set baseline
Average sale value	A$4,500 per won job. Track 35% contribution after direct delivery costs.	Track value
Purchase frequency	Measure completed jobs per active customer over 12 months. Check customer IDs.	Set baseline
Customer lifetime value	Measure contribution per customer over a fixed period. Check retention and delivery costs.	Set baseline
Referrals	Tag referred enquiries and track how many become customers.	Set baseline

Why these two processes? Quote follow-up is the clearest gap in the sample. Estimating time limits how quickly the team can quote. Check crew capacity before pursuing more wins.

The sample assumes read-only access to business records. Confirm the KPI definitions and reconcile missing timestamps before accepting the baseline. The owner approves any pilot.

PROCESS ONE

Give every quote a next step

Growth driver: sales conversion. Process owner: sales coordinator. The owner approves follow-up wording and sets escalation rules.

What breaks today

In this sample, the estimator sends a quote and leaves the next step in email. Nobody has a complete list of open quotes, their due dates or which customer asked to be called next week.

What we would change

Store the sent date, owner and next action in the existing CRM. Give the coordinator a daily list of open quotes coming due. They review and send the follow-up. Stop reminders once the customer replies, books, declines or opts out. Log the outcome and assign a backup owner.

Measure	Illustrative baseline	Pilot target and evidence
Open quotes followed up on time	27 of 60 eligible quotes 45%	At least 85% in 30 days. CRM logs a follow-up within two business days of dispatch. Quotes resolved or on an agreed hold before the deadline are excluded.
Quote-to-win rate	20 of 80 mature quotes 25%	30% target. Compare quotes of a similar type and source, each with 60 days to mature. Count wins by outcome date.
Follow-up guardrail	No consistent suppression log	Zero sends after a reply, decision or opt-out. Coordinator reviews exceptions weekly.

FIRST TEST

Run the list manually for one week.

Check who owns each quote, whether the due dates make sense and which reasons require a person to respond. Add reminders only when the handoff works in practice.

PROCESS TWO

Cut the time to prepare a quote

Faster quoting supports sales conversion and protects contribution per job. The estimating lead owns the process and approves scope, pricing and the final quote.

What breaks today

Site notes arrive in different formats. The estimator rekeys the scope, looks up repeat line items, chases supplier prices and checks the same exclusions each time.

What we would change

Use one intake checklist and a maintained price list inside the current quoting process. A draft pulls in standard items and flags missing scope, pricing exceptions and supplier lead times. The estimator checks the draft, approves any custom pricing and sends the final quote. Keep the source, version and approval on record.

Measure	Illustrative baseline	Pilot target and evidence
Hands-on prep per quote	60 minutes on average 12 timed quotes	35 minutes or less. Include final review and corrections. Time at least 20 matched quotes by complexity before expanding.
Time to send complete quote	Median 3 business days	Median 1.5 business days or less, from complete site notes to send. Compare jobs of similar scope.
Pricing and scope guardrail	No consistent exception log	All quotes approved by an estimator. Zero critical errors in the reviewed sample. Correct material errors before releasing more drafts.

VALUE OF TIME RETURNED

About 28 staff hours per four weeks, if the target holds.

At 80 quotes, 25 minutes saved each releases 33 hours. Allow five hours for upkeep and exception handling beyond per-quote review. Reassign the time to customer follow-up and higher-value estimating.

BUSINESS CASE AND ROADMAP

Decide what to invest in

Modelled figures in AUD, before tax. Estimate the value of incremental wins against pilot costs, then confirm the result after the cohorts mature.

At 80 quotes per four weeks	No lift	Upside +2 pts	Target +5 pts
Additional wins, modelled	0	1.6	4
Added contribution at A$1,575 per win	A$0	A$2,520	A$6,300
Contribution after A$400 running cost	−A$400	A$2,120	A$5,900

Assumptions: A$4,500 average sale × 35% contribution margin, A$4,800 one-off pilot cost and reachable delivery capacity. These are model inputs, not prices for the Bootstrap. A three-period payback needs about two extra wins per four weeks at steady state. Count released staff time separately from contribution and check that wins are deliverable.

What happens after the audit

When	Action	Who owns the decision
Days 6–14	Name the sales owner. Trial the manual follow-up list. Lock the KPI definitions.	Owner and sales coordinator
Days 15–30	Pilot follow-up reminders on one quote type. Review on-time follow-up and exceptions weekly.	Sales coordinator
Days 31–60	With approval, trial quote drafting on one job type. Check prep time, quote quality and team capacity.	Estimating lead
Days 61–90	Review the first mature quote cohort and contribution. Continue measuring later cohorts before expanding. Refine, expand or stop.	Business owner

Decision rule. Proceed only if the owner agrees there is a business case, the team can run the process and the quality checks hold. Pause if the numbers are unclear. You can stop at any point.

Method sources: StreetSmart Business Foundation Checklist, pp. 16 and 18, and Business Acceleration Manual, section 2.14. The quoting workflows draw on the Launchy role-play. All figures are illustrative.