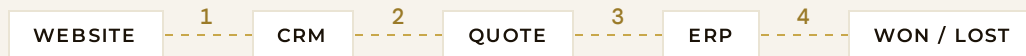


The Quote-to-Close Leak Map

Deals rarely die at the number. They die in the handoffs — between your website, CRM, quoting process, and ERP. This one-page diagnostic finds the seam that's costing you.

HOW TO USE Pick **one recent deal** and trace it end to end. At each of the four seams below, note **where it waited** and **how long**. The seam with the most lost time is where your revenue is leaking.



1 Intake

THE RFQ ARRIVES

Where does a form submission actually land — the **CRM**, or a shared **inbox** someone checks a few times a day? How long before a person with authority sees it, and does anyone rekey it by hand?

WHERE IT LANDED _____

HRS UNTIL ACTION _____

2 Configuration

THE SPEC GETS CONFIRMED

For engineered-to-order work, the quote can't move until someone confirms what's being built. Does that knowledge live in **one estimator's head** or **one aging spreadsheet**? What happens when they're out?

WAITED ON _____

DAYS WAITING _____

3 Quote Generation

THE NUMBER GETS BUILT

Pricing from the ERP, terms from the CRM, specs from engineering — **reassembled by hand**. How many manual re-entries per quote, and where does a version drift or a discount get misapplied?

MANUAL RE-ENTRIES _____

TIME TO BUILD _____

4 Follow-up

THE QUOTE GOES OUT

Once it's out, who owns it? Without a **unified view** of the customer across website, CRM, and ERP, no one can see where a quote sits — and quiet deals go cold because no system flags them.

SEE QUOTE STATUS? _____

DEALS GONE QUIET _____

READING YOUR MAP

Add up the waiting. The slow step is almost never the one everyone complains about — it's **the handoff nobody owns**. Close the highest-leverage seam first, prove it moves the number, then move to the next.

[Book a Discovery Call →](#)