The next job may already be in the pipeline.

Illustrative case study / A lightweight CRM for a commercial maintenance business

The situation

Consider a fictional owner-led commercial maintenance and small-project business. It issues 20 qualified quotes per month and books five jobs. Quote details live across email, notes and a spreadsheet. In this scenario, some quotes have no owner, next action or decision date. The figures describe an example, not an audited business or a B&G client result.

The business question

Could a consistent follow-up process help the business win one additional suitable job each month from the inquiries it already receives? Before building anything, B&G would check why quotes stall. Poor fit, unaffordable pricing, unavailable capacity or weak demand would require different solutions.

The proposed solution

One lightweight CRM with a short pipeline: New inquiry → Qualified → Quote sent → Decision pending → Booked or Closed. Every open opportunity has a named owner, an agreed next action and a due date. The daily view brings overdue decisions to the top. A booked job opens a standard onboarding checklist.

What changes in the working day

The owner opens one follow-up queue instead of reconstructing the pipeline from memory. For example, the fictional Linden Property Group quote shows its value, owner, last activity and an overdue request for a phased option. The next action is to confirm the approval process. After a real conversation, the owner records the outcome and schedules the next step.

The modeled target

20 quotes × 25% booking rate = 5 jobs per month. The test target is 20 × 30% = 6 jobs. That is a five-percentage-point improvement, producing one additional job per month. It is a hypothesis to validate, not an effect the CRM can guarantee.

Why it could work

The system creates accountability around existing opportunities. The owner still needs to respond, resolve questions and sell appropriate work. The software makes those decisions visible and repeatable; it cannot make an unsuitable quote valuable.

A return you can inspect.

The business case counts contribution after direct delivery costs, rather than treating revenue as profit.

Illustrative investment

One-time setup: $3,500. Monthly software and bounded system care: $150. Internal review time: one hour per month at an assumed $100 loaded cost. Total first-year investment: $3,500 + 12 × ($150 + $100) = $6,500. These are proposed inputs for this narrower example, not an approved B&G price or a replacement for the broader Build & Launch offer.

Base-case return

One extra $4,000 job per month × 40% contribution margin = $1,600 additional monthly contribution. Annual additional revenue is $48,000; annual additional contribution is $19,200. Subtract the $6,500 first-year investment: $12,700 net incremental benefit. ROI = $12,700 ÷ $6,500 = 195%, rounded. This is not a statement of total business net profit.

Timing and break-even

At steady gains from month one, monthly contribution after running and internal review costs is $1,350. Setup payback is $3,500 ÷ $1,350 = 2.6 months; at discrete month-end receipts, recovery occurs in month three. The first 90 days produce $550 net benefit. Five additional whole jobs over the year would cover the modeled first-year investment.

Sensitivity

Extra jobs / month	Year-one net benefit	Year-one ROI
0	-$6,500	-100%
0.5 average	$3,100	48%
1	$12,700	195%
2	$31,900	491%

Assumptions that matter

The extra jobs must be genuinely incremental, delivered at the stated margin and supported by available capacity. The model assumes no displaced work, no additional acquisition spend and timely collection. It includes internal CRM review effort but no speculative labor savings. Taxes, financing, timing gaps and unlisted integration costs are excluded. A longer sales cycle delays realized payback.

The downside is real

With no booking improvement, the modeled first-year cost is $6,500 and no incremental benefit is created. More software activity is not proof of ROI. Measure paid, delivered work and its contribution separately from quotes, bookings and invoices.

Start with the last 20 quotes.

A clear next step before committing to a CRM build.

The invitation

Bring us your last 20 quotes. We'll start with a 20-minute fit conversation to understand what happened after they were sent and whether a focused review makes sense. No CRM purchase is required to have that conversation. To begin, reply: "I'd like to review our quote follow-up."

What the review needs

For each quote: sent date, quoted value, service type, outcome, decision date if known, last contact, owner, next action and reason for loss or delay. Use an export or redacted spreadsheet; no mailbox password is needed. Also confirm the average contribution per delivered job and the capacity available for extra work.

What B&G would recommend

Identify the dominant reason suitable opportunities stall. Recommend configuring existing tools, building this bounded CRM, or addressing a different cause first. Detailed diagnosis and implementation would be separately scoped; the fit conversation is not a free full audit.

Example pilot boundary

One business, one pipeline, up to three users, up to 100 imported contacts and one standard intake. Include stage definitions, ownership, next actions, overdue queue, templates, a basic booking report, one handoff checklist, training and two consolidated revision rounds. Complex migrations, accounting integrations, mass outreach and custom AI agents are separate work.

Build and verify

Johnny and the assistant could configure or build the lightweight interface and workflow. The client supplies records, owns follow-up and approves communications. Start with assisted manual updates. Reliable production use also needs access control, durable storage, backups and error handling. The accompanying interactive example is a local simulation with fictional records; it sends nothing and does not persist changes.

Evidence before claiming success

Track at least 30 days of adoption and continue through two typical sales cycles before judging conversion. Compare matched quote cohorts, record loss reasons and account for changes in price, seasonality, lead quality and capacity. Distinguish intended behavior from measured results. If existing tools already meet the need, the best recommendation may be better use of those tools.