



● WORKFLOW DIAGNOSTIC

Workflow diagnostic

Professional services firm · 12 people · reviewed by Raquel Mercado

An illustrative example. Not an actual client result. The firm, the workflow, and the numbers were invented to show the format.

The workflow, as you described it

Every Monday, two account managers pull deal numbers from HubSpot and hours from the time tracker into a Google Sheet. Then they rewrite it as a client email. It takes about three hours and breaks when a deal stage is out of date.

What does it cost a year?

\$20,280

3 hrs × 2 people × 52 weeks × \$65 an hour

Three scored opportunities

Scores run 0 to 10 and weigh value, risk, and how ready the data is. The scores are part of the invented example.

Score	Opportunity	Why it scored this way
8.5	1. Automate the weekly report build	High value, low risk. The data is already structured in HubSpot and the time tracker.
6.0	2. Flag stale deal stages before Monday	Medium value, low effort. A Friday reminder to whoever owns the deal.
4.5	3. Draft the client email from the sheet	Customer-facing, so a person reviews every draft before it goes out. Worth doing later, not first.

Recommended first move

A workflow automation sprint on the report build alone. Leave the client email manual for now.

Price at launch: \$3,500 to \$8,000 · Timeline: 4 to 6 weeks

What would need to be true first

Deal stages in HubSpot are updated by end of day Friday.

What happens next?

If the first move is a defined project, Raquel sends a fixed scope and price in writing. Nothing starts until you approve it. If the read says "not worth automating," that's the end of it. No follow-up pitch.