

bemade.

EXAMPLE DIAGNOSTIC

Industries Nordelle inc.

Fictional company. The situations come from real engagements;
the names, people and figures are invented.

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1. The executive summary

Our conclusion. Nordelle should not start by changing CRM. It must first protect itself, then replace the Access application before Robert, the only person who knows it, retires. The fastest gains are in quotes and order entry, and they depend on that replacement.

Value at stake	\$222,000 per year once everything is in place (low end used)
Total cost	\$170,000 to \$244,000, plus about 375 hours of your people's time over nine months
Payback	9 to 13 months after full implementation
Most urgent risk	No tested restore of a system that every order depends on

The first three steps, this month:

- 1. Set up an off-site backup and test a full restore of the Access application (\$4,000 to \$6,000).
- 2. Correct the three Law 25 (Quebec) gaps (\$3,000 to \$5,000).
- 3. Renew HubSpot monthly, or for one year at most, and decline the proposed three-year commitment.

What we don't recommend. Replacing HubSpot alone with another CRM: it would be a sixth tool to connect to the other five, without touching the real losses, which are in quotes and orders.

What it takes from you. About 375 hours of your people's time over nine months: a designated lead and Robert, each half a day per week; the sales reps, the warehouse and accounting, about twenty hours each for training and testing before their go-live; and a decision on HubSpot before March 15. The details are in section 7.

2. Nordelle today

Nordelle distributes and assembles industrial filtration components: 45 employees, \$18M in revenue, 31% gross margin, about 3,200 active products and 40 suppliers. Five customers account for 60% of volume. Hélène Bouchard, president and owner, is aiming to sell the business in five years.

Key processes, as they actually happen

From request to quote. A request comes in by email or phone. The sales rep opens the Excel price workbook, checks the supplier's price and lead time on its portal or by phone when the workbook is more than a month old (true for 70% of lines), calculates the margin by hand and builds the quote in Excel. The rep then copies it into HubSpot for follow-up. Average turnaround: 3.5 business days.

From order to invoice. The five major customers send their purchase orders as PDFs. An assistant re-enters them in the Access application, line by line. The warehouse picks and assembles from a printed slip. At shipping, the invoice is created in Access, then re-entered in Sage 50 the next day. Nothing is entered in or synced to HubSpot.

From purchase to payment. Samir, the buyer, tracks stock levels in Access and orders by email. Supplier invoices are entered in Sage 50 by Julie Tremblay, the controller, who matches them by hand against the receipts recorded in Access.

Month-end close. Julie exports sales and inventory from Access to Excel, reconciles them with Sage 50, corrects discrepancies and produces the statements. Twelve business days on average. Margin by customer is not calculated: actual purchase costs and sales are never brought together in one place.

The systems map

Customers (email, PDF)	re-entry →	Access application
Suppliers (portals, phone)	verification →	Price workbook (Excel)
Price workbook (Excel)	copy →	HubSpot
Access application	re-entry →	Sage 50
Access application and Sage 50	export →	Month-end close Excel
Google Drive	no link →	—

Five tools, no automatic connection between them. Each arrow is a person who copies, re-enters or exports.
Google Drive holds customer records and contracts, connected to nothing.

3. What the situation costs

The current situation costs about \$235,000 per year in direct costs, plus \$40,000 to \$120,000 in margin on lost sales. Each line was measured or validated with the person concerned at the costing workshop on November 5.

Annual costs

Cost	Type	Baseline	Calculation details	Per year	Confidence
Price checking and quote building	Direct	30 h/wk (three sales reps)	30 h × 48 wk × \$65/h	\$93,600/yr	Measured
Purchase order re-entry	Direct	12 h/wk	12 h × 48 wk × \$55/h	\$31,700/yr	Measured
Order errors	Direct	2.1% of lines	Rework, credits and duplicate shipping, 12-month credit log	\$38,000/yr	Measured
Month-end close	Direct	12 business days	7 days more than a 5-day close × 7.5 h × \$60/h × 12 months	\$37,800/yr	Measured
Reports for the bank	Direct	2 days per quarter	2 d × 7.5 h × \$60/h × 4	\$3,600/yr	Measured
Licences and maintenance	Direct	HubSpot \$24,000, Access consultant \$6,000	Invoices from the last 12 months	\$30,000/yr	Measured
Sales lost to quote turnaround	Opportunity	72% of quotes sent after 2 days	See below	\$40,000 to \$120,000	Estimated
Pricing decisions without actual margin	Opportunity	Margin by customer unknown	Not quantified: the data doesn't exist	—	Hypothesis

Hourly rates are loaded costs (salary, benefits, payroll taxes) provided by Julie.

How lost sales are calculated. Over 12 months, HubSpot shows 1,400 quotes with an average value of \$6,500. Those sent in under two days close at 38%, the others at 22%. If the entire gap came from turnaround time, it would be worth about \$325,000 in gross margin. Not all of it does: slow quotes are also the most complex. We attribute only 12% to 37% of it to turnaround time, or \$40,000 to \$120,000. The ranking uses the low end.

The risks carried

These are not annual costs, but what a likely event would cost.

Risk	What would happen	Cost if it happens	Probability
Access application outage	Two to four weeks of orders handled by hand, errors, lost customers	\$60,000 to \$180,000	Medium: 7-year-old workstation, no restore tested
Robert Gagnon's departure	No one knows how to modify or troubleshoot the application anymore	Replacement 30% to 50% more expensive and riskier	Certain: retiring in 18 months
Three-year HubSpot commitment	Locked in until 2029 at a 40% higher price	Up to \$67,000 for the two extra years	To decide before March 15

Risk	What would happen	Cost if it happens	Probability
Law 25 (Quebec) gaps	Possible penalty, reputational damage in case of an incident	Not quantified, to be validated with your legal advisor	Low to medium

4. The systems, area by area

Each tool does its job correctly on its own. The problem is between them: nothing moves without a person, and the core of operations rests on the most fragile tool.

System	Satisfaction	Cost per year	Robustness	Dependency and aging	Security and Law 25 (Quebec)	Automation
Access application (orders, inventory)	Good for the warehouse, poor for sales: no customer view	\$6,000 (consultant)	Low: a 7-year-old workstation, no restore tested	High: undocumented in-house code, only one person knows it, a technology no one develops for this use anymore; no vendor to turn to	No per-user access control	None: connects to nothing
Sage 50 (accounting)	Adequate for bookkeeping	Included in the current subscription	Good: cloud backup	Medium: product maintained, but the vendor is pushing its cloud offering; data exportable with effort	Access limited to two people	Low: everything arrives through re-entry
Excel (prices, quotes)	Appreciated: fast and flexible	—	Low: 14 versions of the price workbook in circulation	Medium: no vendor involved, but homemade formulas that only two sales reps understand	Files on workstations and in Drive	None: prices updated by hand
HubSpot (sales tracking)	Medium: used mostly as an address book, about 20% of features	\$24,000, 40% increase announced	Good (cloud)	High: price set by the vendor, three-year commitment proposed; contacts can be exported, automations and reports would have to be rebuilt elsewhere	Data hosted in the United States; not mentioned in the privacy policy	Low: quotes are copied into it, not created there
Google Drive (customer records, contracts)	Useful, but no one knows where the latest version is	Included	Good	Low: standard files, easy to move	Customer records in open shared links	—

The Law 25 (Quebec) gaps to correct. No one has been designated as responsible for the protection of personal information. There is no inventory of the personal information held. Customer records are accessible through open shared links. These are findings to correct, not a legal opinion: we recommend validating the approach with your advisor.

The alternatives compared

Option	What it solves	What it doesn't solve	Upfront cost	Annual cost
A. Change nothing, protect only	The outage and the Law 25 (Quebec) gaps	Lost time, errors, Robert's departure, unknown margin	\$7,000 to \$11,000	\$30,000 (unchanged)

Option	What it solves	What it doesn't solve	Upfront cost	Annual cost
B. Replace HubSpot with another CRM	HubSpot's price	Everything else; adds a sixth tool to connect	\$15,000 to \$25,000	\$10,000 to \$18,000
C. Replace Access with specialized inventory software, keep the rest	Access's fragility, Robert's departure	Quotes, double entry into Sage, margin by customer	\$40,000 to \$60,000	\$12,000 to \$20,000
D. A single management system (Odoo) for sales, orders, inventory and accounting	Everything above, and makes the automations in ranks 6 to 8 possible	Requires nine months of commitment from your team	\$90,000 to \$130,000	\$8,000 to \$15,000
E. A high-end ERP (such as NetSuite or Dynamics)	Same as D	High cost and dependency for Nordelle's size; customization more expensive	\$180,000 to \$300,000	\$45,000 to \$70,000

We recommend **D**, preceded by **A**. Option D also exists in a free version (Odoo Community): if Nordelle ever wanted to do without a subscription, its data and code would remain its own.

Alignment with the sale objective

In five years, a buyer will ask for margin by customer and by product, process documentation, and what happens if a key person leaves. Today, all three answers are weak, which would weigh on the price. Ranks 4, 5 and 8 address them directly. We don't put a number on the effect on the sale price: it depends on the market at the time of sale.

5. The options

Nine options: four to protect, one foundation, three investments, and one that waits. Each has its own sheet, with the six measurement elements and the five criteria.

Protect yourself

Rank 1. Tested off-site backup, Access application documented

- **Indicator:** successful full restore, and the time it takes.
- **Baseline** → **target:** no restore ever tested → a restore tested every quarter, in under four hours.
- **Value:** avoids a two- to four-week outage, estimated at \$60,000 to \$180,000. Confidence: estimated.
- **Verification:** the restore test log, signed every quarter.
- **Cost:** \$4,000 to \$6,000. **Execution risk:** low. **Dependencies:** none; to be done this month.

Rank 2. Correct the Law 25 (Quebec) gaps

- **Indicator:** number of open gaps.
- **Baseline** → **target:** 3 → 0 (designated privacy officer, inventory of personal information, open shared links closed).
- **Value:** reduces the risk of penalties and reputational damage. Not quantified. Confidence: hypothesis.
- **Verification:** the inventory kept up to date and an annual access review.
- **Cost:** \$3,000 to \$5,000, plus your legal advisor's opinion. **Execution risk:** low. **Dependencies:** none.

Rank 3. Renew HubSpot monthly or for one year at most

- **Indicator:** length of the commitment.
- **Baseline** → **target:** three years proposed → monthly, or one year at most.
- **Value:** keeps the freedom to switch when rank 5 is ready; avoids up to \$67,000 in commitment for the two additional years. Confidence: measured (vendor's offer).
- **Verification:** the signed contract.
- **Cost:** none, other than a slightly higher monthly price. **Execution risk:** low. **Dependencies:** decision before March 15.

Rank 4. Document what Robert knows, before anything else

- **Indicator:** Access application business rules written down and checked by a second person.
- **Baseline** → **target:** in one person's head → a document of about 40 rules (special pricing, assemblies, billing exceptions), validated by Samir.

- **Value:** without this work, the rank 5 replacement would cost 30% to 50% more, or \$27,000 to \$65,000. Confidence: estimated.
- **Verification:** each rule tested during the rank 5 test migrations.
- **Cost:** \$5,000 to \$8,000, and Robert half a day per week during months 1 and 2. **Execution risk:** medium, it depends on his availability. **Dependencies:** to be completed before rank 5 starts.

The foundation

Rank 5. One system for sales, orders, inventory and accounting

- **Indicator:** number of tools that require re-entry between them.
- **Baseline** → **target:** five tools, no connection → one system (Odoo), with order and accounting history carried over.
- **Direct value:** \$15,000 to \$22,000 per year (\$30,000 in licences and maintenance replaced, minus \$8,000 to \$15,000 for the new subscription). Confidence: measured. **Its real value is what it unlocks:** ranks 6 to 8, or \$207,000 per year.
- **Verification:** shutdown of the Access application and of re-entry into Sage 50, on a set date.
- **Cost:** \$90,000 to \$130,000, excluding your team's time (detailed in section 7). **Execution risk:** medium; reduced by rank 4 and by repeated test migrations before cutover. **Dependencies:** rank 4 completed; unlocks ranks 6, 7 and 8.

Invest

Rank 6. Major customers' orders entered automatically

- **Indicator:** data entry hours per week; percentage of lines with errors.
- **Baseline** → **target:** 12 h → 2 h; 2.1% → 0.3%. PDF purchase orders from the five major customers are read automatically; a person checks and confirms.
- **Value:** \$59,000 per year (\$26,400 in time given back, \$32,600 in errors avoided). The time given back goes to delivery follow-up, currently done late. Confidence: measured.
- **Verification:** monthly report of orders by source, and the credit log.
- **Cost:** \$18,000 to \$25,000. **Payback:** 4 to 5 months. **Execution risk:** low. **Dependencies:** rank 5; goes live at the same time.

Rank 7. Supplier prices updated automatically, quotes in one day

- **Indicator:** price-checking hours per week; average quote turnaround; close rate.
- **Baseline** → **target:** 30 h → 8 h; 3.5 days → 1 day. Prices and lead times from the main suppliers are retrieved automatically; the quote is created in the system with the margin calculated.
- **Value:** \$108,000 per year counted (\$68,000 in time given back to sales reps for selling, and \$40,000 to \$120,000 in margin on sales won, low end used). Confidence: measured for time, estimated for sales.

- **Verification:** monthly report of quotes by sales rep: number, turnaround, close rate.
- **Cost:** \$35,000 to \$50,000. **Payback:** 4 to 6 months. **Execution risk:** medium, some suppliers have no usable portal. **Dependencies:** rank 5.

Rank 8. Close in 5 days, margin by customer every month

- **Indicator:** business days to close; margin by customer available by the 6th of the month.
- **Baseline** → **target:** 12 days → 5; bank reports from 2 days → half a day; margin by customer unknown → monthly.
- **Value:** \$40,000 per year in time (\$37,800 from the close, \$2,700 from bank reports), plus pricing decisions based on actual margin, not quantified. Confidence: measured for time, hypothesis for decisions.
- **Verification:** publication date of the monthly statements, tracked for twelve months.
- **Cost:** \$15,000 to \$20,000. **Payback:** 5 to 6 months. **Execution risk:** low. **Dependencies:** rank 5; three months of data in the new system.

What waits

Online ordering portal for customers. Value not demonstrated today: no customer has asked for it. Depends on ranks 5 and 7. **Condition to move it up:** two of the five major customers ask for it, or the share of orders by email exceeds what rank 6 absorbs.

The big picture

Rank	Option	Family	Value over 12 months	Cost	Payback
1	Tested backup, Access documented	Protect yourself	Avoids \$60,000 to \$180,000	\$4,000 to \$6,000	Immediate
2	Law 25 (Quebec) gaps	Protect yourself	Not quantified	\$3,000 to \$5,000	—
3	HubSpot monthly or one year	Protect yourself	Avoids up to \$67,000	\$0/yr	—
4	Document what Robert knows	Protect yourself	Avoids \$27,000 to \$65,000	\$5,000 to \$8,000	—
5	One system	Foundation	\$15,000/yr	\$90,000 to \$130,000	Through what it unlocks
6	Automatic order entry	Invest	\$59,000/yr	\$18,000 to \$25,000	4 to 5 months
7	Prices and quotes	Invest	\$108,000/yr	\$35,000 to \$50,000	4 to 6 months
8	Close and margin	Invest	\$40,000/yr	\$15,000 to \$20,000	5 to 6 months
Total			\$222,000 per year	\$170,000 to \$244,000	9 to 13 months

6. The recommended sequence

Protections this month, the foundation in six months, the investments in the three months after that. Everything is in place after nine months; full value builds from there.

MONTHS 0 TO 1 Protect ranks 1 to 4	MONTHS 1 TO 6 One system rank 5	MONTH 6 Automatic orders rank 6, at go-live	MONTHS 6 TO 8 Prices and quotes rank 7	MONTHS 7 TO 9 Close and margin rank 8
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When	What	Why at this point
This month	Ranks 1, 2 and 3	Inexpensive, and these are the only risks that could stop the business or lock it in right now
Months 1 and 2	Rank 4: documentation with Robert	Must come before rank 5; Robert is available now, not in 18 months
Months 1 to 6	Rank 5: one system, with repeated test migrations by function	The foundation without which none of the gains in ranks 6 to 8 are possible; cutover planned outside peak season
Month 6	Rank 6: automatic orders, at go-live	The fastest gain, ready as soon as the system is
Months 6 to 8	Rank 7: prices and quotes	The biggest gain, but it requires sales reps to already be comfortable in the system
Months 7 to 9	Rank 8: close and margin	Requires three months of clean data in the new system
Month 12	First result measurement, indicator by indicator	Compared with the baselines in section 3

What would change this order. If Robert left earlier, rank 4 would move ahead of everything else. If sales dropped, rank 7 would move ahead of rank 6, because it directly affects revenue.

7. What it takes from Nordelle

Success depends less on the software than on your team's time and decisions. In all, about **375 hours** of your people's time over nine months, broken down as follows.

The phases

Phase	When	What happens	Who on your side
Detailed discovery	Months 1 and 2	Workshops by function; documentation of the Access application rules (rank 4)	Julie, Robert, one session per function
Configuration and test migrations	Months 2 to 5	Three full test migrations; after each one, every function checks its data and screens	Julie, Robert, testers by function
Training and acceptance testing	Months 4 to 6	Each group is trained, then validates its scenarios before cutover: nothing goes live without its sign-off	Sales reps, purchasing, warehouse, order entry, accounting
Cutover	Month 6, outside peak season	Final migration, Access application shut down, first week supported on site	Everyone, one week of availability
Automations and stabilization	Months 6 to 9	Ranks 7 and 8, each with its own training and testing; first close supported	Sales reps, accounting

Who, and how much time

Who	Role	Rhythm	When	Estimated total
Hélène Bouchard	Steering committee, trade-offs, three decisions (below)	1 h every two weeks	Months 1 to 9	20 h
Julie Tremblay, project lead (proposed)	Makes day-to-day decisions, coordinates testing, validates the data from each test migration	Half a day per week	Months 1 to 9	135 h
Robert Gagnon	Access application rules at the start; testing and feedback on test migrations after that	Half a day per week	Months 1 and 2, then months 4 to 6	75 h
The three sales reps	One discovery workshop; testing after each test migration; training; acceptance testing of quotes (rank 7) before go-live	Sessions of 1.5 to 2 h, plus a day of training	Months 2 to 8	24 h each
Samir and the warehouse manager	Workshop; testing of receipts, inventory and assemblies; training	3-hour sessions, plus a day of training	Months 2 to 6	20 h each
The order entry assistant	Workshop; testing of automatic order entry (rank 6); training	Sessions of 1.5 to 2 h, plus half a day of training	Months 2 to 6	9 h

Who	Role	Rhythm	When	Estimated total
Accounting (in addition to Julie's role)	Validation of the historical data carried over; first close supported (rank 8)	Two days, then a close	Months 5 and 7	23 h

Sales reps, the warehouse and order entry test **before** receiving their new tool: each group validates its own scenarios on real data, and we don't cut over until they're ready.

Three decisions that are yours alone: the HubSpot commitment (before March 15), the cutover date (outside peak season), and shutting down the Access application on that date, with no extended parallel run.

8. Appendices

In a real diagnostic, the appendices contain all the logs and all the calculations, so you can redo every figure without us. Here is an excerpt.

A. Price-checking time log (excerpt)

Log kept by the three sales reps from October 20 to 31, two business weeks.

Sales rep	Quotes	Lines checked	Checking and quote-building hours	Hours per week
Sales rep 1	24	310	22.5 h	11.3 h
Sales rep 2	19	255	19.0 h	9.5 h
Sales rep 3	17	190	18.5 h	9.3 h
Total	60	755	60.0 h	30.0 h

B. Order error log (12-month summary)

Cause	Lines	Cost
Wrong quantity or wrong product re-entered	212	\$21,500/yr
Wrong customer price	96	\$9,800/yr
Duplicate shipping (redo)	41	\$6,700/yr
Total	349 lines out of 16,600 (2.1%)	\$38,000/yr

C. Calculation assumptions

- Loaded hourly costs provided by the controller: sales reps \$65, order entry assistant \$55, accounting \$60.
- 48 working weeks per year.
- Average quote value (\$6,500) and close rates (38% and 22%): extracted from HubSpot, last 12 months.
- Implementation costs are market ranges for a company of this size; they would be confirmed by a separate proposal.

D. People interviewed

Hélène Bouchard (president), Julie Tremblay (controller), Robert Gagnon (inventory and Access application), Samir (purchasing), the three sales reps, the warehouse manager, the order entry assistant. Eleven interviews, 14 hours in total.