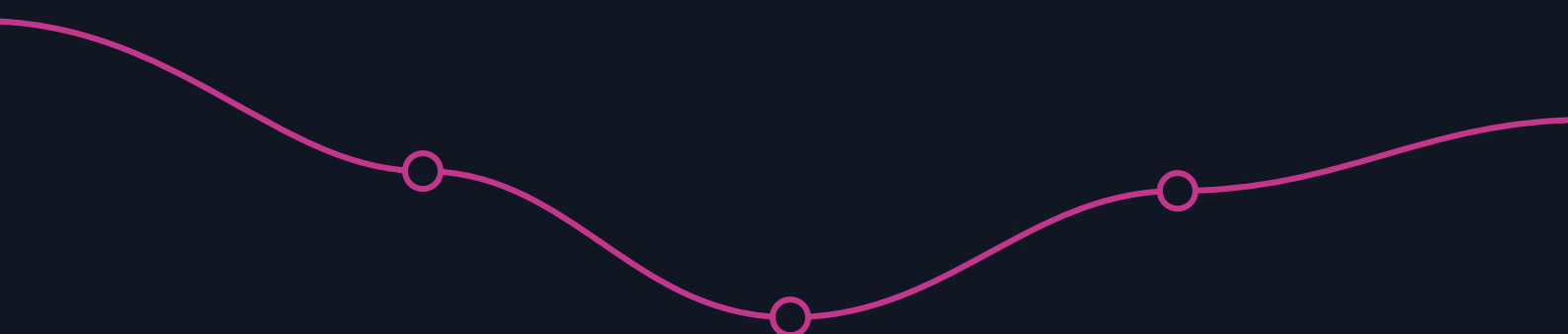




Brightwater Research Partners

Brightwater gets enough enquiries, and loses work in the days after they come in.

Where Brightwater's work comes from, where it goes missing, and whether the Install would help.

PREPARED FOR

Helen Marsh, founder

PREPARED BY

Travor Akwenye,
InspiredWorkx

DELIVERED

Day 5 of the Diagnostic

EVIDENCE

Three months of
Brightwater's own records

A sample report. Brightwater Research Partners isn't a real firm, and its people and numbers are made up. A real report is laid out and written like this one.

Confidential: for the partners of Brightwater Research Partners.

Brightwater Research Partners · Diagnostic report · Prepared for Helen Marsh by Travor Akwenye, InspiredWorkx, on day 5 · Based on three months of Brightwater's own records

MY ANSWER

Yes, the Install fits, as long as Brightwater buys two Claude Team seats before it starts.

More enquiries wouldn't change much. The work is lost after they arrive: replies wait, proposals go out six working days after the call, and once a proposal is sent nobody agrees what happens next. Those are follow-up problems, and a system can draft that work while Helen or Tom approves every message.

4 of 22

Enquiries got no reply.
I found no reply to four of them, all sent to the general inbox. Another seven waited more than two working days.

6 working days

The usual gap between the call and the proposal.
The two that took more than eight working days were both lost.

5 of 6

Proposals went out with no next step agreed.
Three of them are still undecided, more than 30 days on.

What I'd do

- 1. Start with the enquiries.** Put every enquiry in one shared inbox and give Helen or Tom a list each morning, with a reply drafted for each, so none waits more than a working day.
- 2. Then the proposals.** Gather Brightwater's last 14 proposals into a library and draft each new one from the call notes.
- 3. Then the follow-up.** Agree a next step and a date on every call, so the follow-up is drafted and waiting when that date comes.

What I'd measure

MEASURE	TODAY
Median time to first reply	1.5 working days
Enquiries with no reply	4 in three months
Median days from call to proposal	6 working days

I'd judge the Install on replies first, and on proposal speed after that.

Next step

I could start the Install within two weeks. It's \$9,500 fixed, less \$975 if you book within 90 days of this report.

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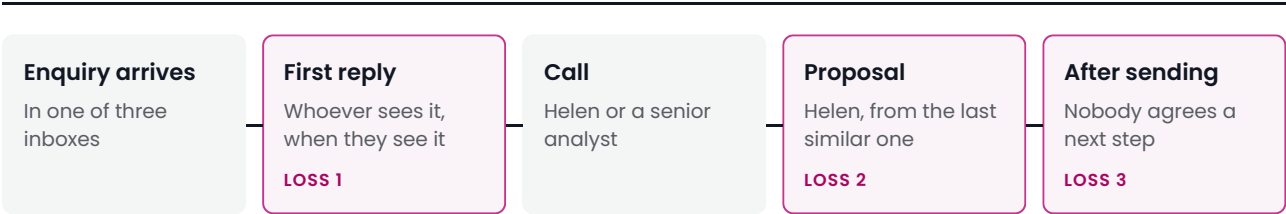
1 · HOW YOU WIN WORK NOW

Referrals bring in enough work, but what happens next depends on who sees the email first.

Brightwater is a 16-person B2B market research firm in Manchester that sells studies to industrial manufacturers. Most of its work comes through past clients and two industry associations, and about one job in six is a tender.

Enquiries land in three different inboxes, and whoever spots one first replies. Helen writes every proposal herself, usually starting from the last one like it. When she has time, that works. When she doesn't, both the enquiries and the proposals sit and wait.

EXHIBIT 1
Before an enquiry turns into a proposal, it passes through three inboxes and four pairs of hands.



Source: my first session with Helen Marsh, and Brightwater's inboxes and proposal folder, checked on her screen.

EXHIBIT 2
Where Brightwater stands today, from its own records.

MEASURE	VALUE	BASED ON
Median time to first reply	1.5 working days	22 enquiries
Median time from call to proposal	6 working days	6 proposals
Proposals sent	2 a month	6 proposals in three months
Proposals won	1 of 3 decided	Of the 6 proposals sent, 3 are decided and 3 still open. Too few for a win rate.
Helen's time per proposal	About 8 hours	Her estimate, for five proposals

Source: Brightwater's enquiry list and proposal folder for the last three months, and my first session. I use medians because a few very late replies would pull an average out of shape.

What's already working

- Demand.**

Twenty-two enquiries in three months, mostly from referrals, is enough for this kind of system to earn its keep.
- Reputation.**

Past clients and two industry associations send work your way without being asked.
- Speed, when you have it.**

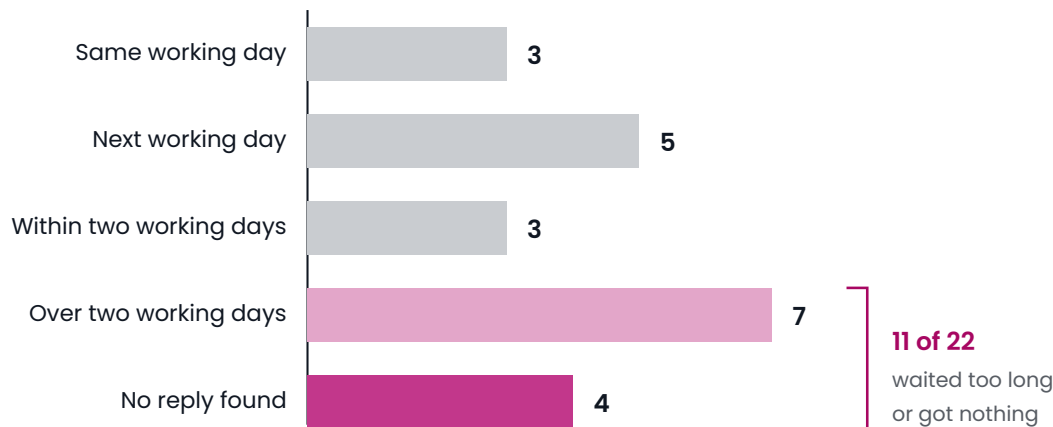
The one proposal you won was sent four working days after the call. It's a single case, but it fits the pattern in the losses.

2 · WHERE YOU LOSE IT

Work slips away at the first reply, while a proposal is being written, and after it's sent.

EXHIBIT 3

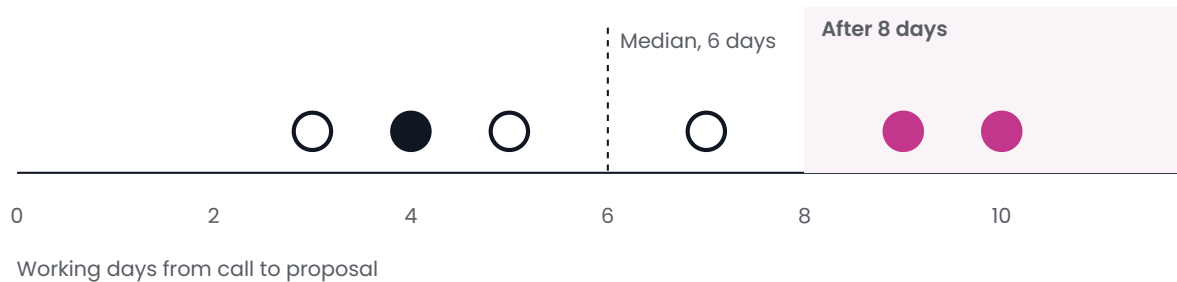
Half the enquiries waited more than two working days for a reply, or never got one.



Note: 22 enquiries came in over three months, and all four that got no reply went to the general inbox. Source: Brightwater's enquiry list, checked against the three inboxes on screen.

EXHIBIT 4

The two proposals that took more than eight working days were both lost.



● Won ● Lost ○ Still undecided

Note: six proposals is a small sample, so treat this as something to keep an eye on. In one of the two losses the client said a competitor had "got there first", though that's one case. Source: Brightwater's proposal folder and call notes for the last three months.

Enquiries wait.

Four got no reply I could find, another seven waited more than two working days, and nobody looks after the general inbox.

Proposals go out late.

The usual one goes out six working days after the call, and the two slowest were both lost.

Proposals drift.

Five of the six had no next step agreed, and three are still undecided after more than 30 days.

3 · YOUR WORKFLOWS, SCORED

Replying to enquiries scores full marks and following up proposals comes close behind, so that's where to start.

I scored each of Brightwater's sales workflows from 0 to 2 on five questions. A high score means a system could draft the work while a person approves each message. Anything scoring six or more out of ten is worth building; below six, I'd give advice instead.

EXHIBIT 5
All six workflows clear the bar, and two score 9 or 10.

WORKFLOW	WHAT IT LOSES EACH MONTH (ESTIMATED)	HOW OFTEN	CONTEXT	RULE-LIKE	REACHABLE	APPROVAL POINT	TOTAL
First reply to enquiries	1 to 2 unanswered; 2 late	2	2	2	2	2	10
Following up sent proposals	1 drifting	1	2	2	2	2	9
Writing proposals	About 2 days late each	1	2	1	2	2	8
Keeping past work findable	Past work hard to find	1	1	2	2	2	8
Weekly pipeline review	No regular review	1	2	1	2	2	8
Deciding which tenders to bid for	1 low-chance tender a quarter	0	1	2	2	2	7

Source: both sessions and Brightwater's records, checked on screen; the scores are mine. The monthly losses are my estimates from three months of records.

How to read the scores

How often 2: several times a week. 1: a few times a month. 0: rarely.	Context 2: what's needed sits in the email and your files. 1: some of it lives in people's heads. 0: most of it does.
Rule-like 2: the decisions follow clear rules. 1: some judgement. 0: mostly judgement.	Reachable 2: the tools you already use can be connected. 1: partly. 0: not without new software.
Approval point 2: there's a natural moment for a person to approve before anything is sent. 0: there isn't.	

4 · DOES THE INSTALL FIT?

VERDICT

Yes, with one condition.

- You lose work after enquiries arrive: in slow replies, late proposals and follow-up that never happens.
- You get enough enquiries for the system to pay its way.
- None of your sales email involves regulated data.

The condition. Brightwater doesn't have a Claude plan yet, so Helen and one colleague need Claude Team seats before I start: at least two, at about US\$20 to \$25 each a month, paid to Anthropic. Helen has picked Tom Reid, the senior analyst who answers most enquiries, as the colleague I'll train.

5 · WHAT I'D SET UP FIRST

1 The enquiry queue. One shared inbox that becomes a list each morning, with a reply drafted for every enquiry. Helen or Tom reads it, changes what they like and sends it.	2 The proposal library. Your last 14 proposals, gathered so each new draft starts from your best work instead of whichever one is newest.	3 The follow-up plan. You agree a next step and a date on the call, and on that date the follow-up is drafted and waiting.
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6 · YOUR ACCOUNTS

Claude plan	None yet. You'd buy Team before the Install (the condition above).
Email	Google Workspace. In the first hour of the Install I check that drafts appear in Gmail.
Documents	Google Drive.
Pipeline	A spreadsheet for now. I'd use the Notion template, which Helen liked better.
Settings	A free GitHub account in Brightwater's name holds the system's settings and instructions, so they're yours and someone else could take them over.
Data storage	Claude keeps business data in the United States. Helen has read this in the data statement and accepted it.

7 · NEXT STEP

I could start within two weeks. The Install is **\$9,500 fixed**, less the **\$975 credit** if you book within 90 days of this report.

APPENDIX

I listened, checked what you told me against your own inboxes and files, and only then scored anything.

The five working days

1. **Day 1.** A 90-minute session with Helen and Tom on how work comes in, who answers it and how proposals get written, with a real example of each.
2. **Day 2.** I mapped each workflow from start to finish and listed what still needed checking.
3. **Day 3.** I scored the workflows, estimated what each one costs you and drafted the verdict.
4. **Day 4.** A 75-minute session with Helen, checking my findings on her screen against the inboxes, the proposal folder and the pipeline, and talking through the draft verdict. We also went through the three proposals still undecided; Helen chose two to revive and left with a next step and a draft follow-up for each, to finish and send herself.
5. **Day 5.** This report, checked against the evidence before it went out.

What I looked at

- Your enquiries from the last three months, with when each came in, how, and when it was answered.
- Your last six proposals, the call notes behind them, and the tenders you answered in the last year.
- Your pipeline spreadsheet.
- Helen's estimate of how long each proposal takes her.

What I didn't do

- I never logged in to a Brightwater system. You showed me things on screen or sent a summary.
- The only access I had was a shared folder Helen set up. It's on the access record, and it ends today.
- After today I keep only this report and the invoice.

What this report can't tell you

- Three months is a short window, so seasonal patterns won't show.
- Six proposals is a small sample, and I've said so wherever it matters.
- The monthly losses in Exhibit 5 are my estimates.

If anything here raises a question, write to Trevor at trevor@inspiredworkx.com.

A sample report. Brightwater Research Partners isn't a real firm, and its people and numbers are made up.