FILL SYSTEM

What a Diagnostic Looks Like

The methodology behind every Fill System engagement. Sample questions, a scored maturity profile, and an example of what we typically find.

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METHODOLOGY

How the diagnostic works

Every engagement starts with the same structured review. We assess five operational areas through direct observation, data analysis, and team interviews. The output is a scored maturity profile, a prioritized list of findings, and a concrete roadmap.

We score what your team actually does, not what it reports. A process that is documented but not followed scores the same as one that was never documented. A CRM that holds six months of clean data scores higher than one with a hundred custom fields and no governance.

Five assessment dimensions

Dimension	Questions
Process and Workflow	10 questions
Systems and Tools	8 questions
Data and Reporting	6 questions
Risk and Security	6 questions
Automation and AI Readiness	5 questions

How scoring works

1. Ad hoc. No documented process. Outcomes vary by person.
2. Emerging. Partial documentation. Followed inconsistently.
3. Defined. Processes documented and mostly followed. Gaps known.
4. Managed. Measured and reviewed regularly. Ownership clear.
5. Optimized. Continuously improved. Automated where repeatable.

Most B2B companies at 50 to 200 employees score between 2.0 and 3.0 overall. A score above 3.0 across all dimensions puts the company in the top quartile for operational maturity at this stage. The goal is not to reach 5.0 everywhere. The goal is to find which dimensions need to move one level up to unlock the most business value.

DIAGNOSTIC QUESTIONS

Ten questions from the framework

A typical diagnostic uses 20 to 25 questions from our full set of 35, selected based on company size, industry, and the stated reason for the engagement. These ten represent the questions that surface the most actionable findings.

Process and Workflow

Who owns the lead-to-close handoff, and when was ownership last confirmed?

We are looking for a named individual with a documented SLA, not a team or department label.

Red flag: no named owner, or ownership assigned but never verified.

Process and Workflow

Where does work stall when someone is on PTO?

Single-person dependencies that create bottlenecks. If more than two processes stop when one person is unavailable, the operating model has a structural gap.

Process and Workflow

When was the last time a process was retired or simplified?

Evidence of active process management, not just process creation. Companies that only add processes accumulate complexity faster than they can manage it.

Systems and Tools

How many systems hold customer contact records?

Most companies undercount by two to three times on the first attempt. More than three systems with no designated single source of truth is a data quality risk.

Systems and Tools

Who maintains your integration flows? Is there documentation?

We need a named owner, version history, error handling, and monitoring. One person who built everything and left no documentation is the most common finding.

Data and Reporting

How many definitions of "qualified lead" exist across teams?

Most companies have two to four competing versions. When Marketing and Sales define "qualified" differently, every pipeline report tells a different story.

Data and Reporting

Which dashboards does the CEO actually open?

The real reporting surface versus the intended one. If the CEO asks for custom reports over email instead of using existing dashboards, the reporting infrastructure has failed.

Risk and Security

Who has admin access to the CRM, and when was the list last reviewed?

A current access list reviewed in the past 90 days. In our reviews, the most common finding is admin accounts that belong to people who left months ago.

Risk and Security

When was the last time someone tested restoring data from a backup?

Configured backups are not the same as tested backups. An untested backup is an assumption, not a safety net.

Automation and AI

Which decisions currently require a human that could be rule-based?

Approval or routing decisions with clear, documentable criteria. If the criteria are simple enough to write down, they are simple enough to automate.

> These are 10 of 35 questions in the full framework. We select and weight questions based on company size, industry, and the problem that prompted the engagement. A typical diagnostic runs 20 to 25 questions plus follow-ups specific to what we find.

SAMPLE OUTPUT

Maturity scorecard

This is a redacted example from a diagnostic engagement with a B2B SaaS company at approximately 100 employees. Scores are based on field observations and data analysis, not self-reported assessments.

DIMENSION	SCORE	BENCHMARK	GAP	KEY OBSERVATION
Process Maturity	2.0	3.5	-1.5	4 of 7 critical workflows had no documented owner
Data Quality	2.0	3.5	-1.5	23% of CRM contact records missing required fields
Tool Utilization	3.0	3.5	-0.5	HubSpot at 34% feature adoption versus 80% paid tier
Team Alignment	2.5	3.5	-1.0	Sales and Marketing disagreed on lead qualification criteria
Risk Management	2.5	3.0	-0.5	8 employees retained admin CRM access with no review cycle

2.4
Overall maturity score (out of 5.0)

3.4
Industry benchmark for this company stage

90 days
Timeline to close the gap in Process and Data

The 1.0-point gap between this company's score and the benchmark was concentrated in Process Maturity and Data Quality. Both are addressable within 90 days without new tooling. The three highest-impact findings from this engagement are on the next page.

> **Illustrative example.** This is not a specific client engagement. Data points are representative of patterns we observe in B2B companies at 50 to 200 employees. The structure and format shown here match what a real diagnostic report contains.

SAMPLE FINDING

Revenue leaking through handoff gaps

4	3-7 days	$180-240K
Undocumented handoffs	Average lead idle time	Annual revenue at risk

What we found

Leads passed through four handoff points between first touch and sales assignment. None of these transitions had a documented owner, SLA, or escalation path.

At two points, leads sat in a shared inbox for three to seven days. During that window, 18% of leads went cold based on six months of CRM data. The revenue estimate uses the company's own average deal size ($42K) multiplied by leads lost to inaction (4.3 to 5.7 per month).

The handoff chain

Website form	Auto-assign	Shared inbox (3-7d)	SDR outreach
Email handoff		AE assignment	

Red borders mark undocumented handoff points with no SLA or ownership.

Why this costs money

Response within five minutes converts at eight times the rate of response after 24 hours. The company paid $38 per lead in marketing spend. Leads that idled for three or more days converted at 4% versus 22% for same-day contact.

The fix

Round-robin auto-assignment in HubSpot, already available in the current plan. A four-hour SLA with a Slack notification on miss. Estimated implementation: two to three days. No new tooling required.

> **Combined exposure across all three findings in this engagement exceeded $500K annually.** The highest-return fix (this one) required no new tooling and was implemented within 30 days.

PRIORITIZATION

How we decide what to fix first

Every diagnostic ends with a priority matrix. Findings are plotted by business impact against implementation effort. The matrix drives a phased roadmap so the team starts with changes that deliver measurable results in the first 30 days.

QUICK WINS	STRATEGIC BETS
CRM handoff SLAs (Finding 1) Admin access audit (8 accounts) Lead routing round-robin	Approval workflow redesign (Finding 3) Metric dictionary and field lockdown (Finding 2) Dashboard consolidation
FILL-INS	**DEPRIORITIZE**
CRM field cleanup (empty records) Slack channel consolidation	Full tool stack replacement Custom BI platform build

EFFORT

Sample 90-day roadmap

Phase 1 Days 1 to 30

CRM round-robin auto-assignment. Handoff SLAs with four-hour response. Admin access audit (8 accounts reduced to 3). CRM required field cleanup (23% gap to under 5%).

Phase 2 Days 31 to 60

Single metric dictionary ratified across three teams. HubSpot calculated fields locked to dictionary. Unified executive dashboard replacing three spreadsheets.

Phase 3 Days 61 to 90

Approval workflow consolidation (11 steps to 4). Digital signature for VP approval. Auto-provisioning triggers for new accounts. Automation candidates identified for the following quarter.

> **Expected outcomes by day 90:** Lead response time from 3-7 days to under 4 hours. Reporting reconciliation from 40+ hours per month to 2. Approval cycle from 14 days to 4. Estimated annual savings: $414K to $474K combined.

Start with a free diagnostic

The initial diagnostic call takes 30 to 45 minutes. No pitch, no obligation. We spend that time understanding your situation. If we see a fit, we propose a structured engagement. If we do not, we tell you that too.

Email: oxfordconstruction.ca@gmail.com

Web: www.fillsystem.com

Request a diagnostic: www.fillsystem.com/#diagnostic-request-form

Built for

B2B companies at 50 to 250 employees. SaaS, professional services, logistics, manufacturing, multi-location operators. Teams that have outgrown their initial tooling and processes but have not built the operational layer for the next stage.

Not built for

Pre-revenue startups. Enterprise companies with established PMO and process teams. Companies looking for a specific tool implementation without diagnostic context first.