

FICTIONAL EXAMPLE / NO CLIENT RESULTS

A clearer way to follow up on quotes

Example: a fictional six-person property-maintenance firm
Scope: sent quotes, from sending to a recorded next action

RECOMMENDATION

Keep the sheet. Make the next action visible.

Run a two-week trial using the spreadsheet the team already has. Give every open quote an owner and a next date, then review the due list each morning.

The assumed problem is missing responsibility and a reliable review habit. A new app may help later, but the same missing habit would follow the team into it.

The current workflow

Customer asks for work > office creates quote > owner emails quote > office searches email for an update > next action is remembered or missed.

The numbers to test

2 h/week

Assumed status-search time

1 h/week

Trial recovery target

\$0

Established cash savings

Illustrative inputs: 20 quote checks/week × 6 minutes = 120 minutes. Recovering half would free about 4.3 hours/month. At an assumed \$35/hour, that is about \$152/month of staff capacity. Payroll and subscriptions stay unchanged. No revenue lift is assumed.

All business details and estimates are synthetic. No interview or client records were used. Record actual effort before relying on the estimate.

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Three paths, with the costs visible

Start with A. Move to B only if shared coordination still fails. Option C needs a specific gap that the available tools cannot fill.

A / RECOMMENDED

Improve the existing sheet

One row per quote, with owner, status, last contact, next action and due date. Use a filter or conditional formatting, then a daily human review. Google documents custom formatting rules [1].

Setup: illustrative 2 to 4 hours with practice. Added software: \$0 only if existing access is sufficient. The client owns the account and records. The coordinator maintains dates and exports a weekly copy. No automated reminders are promised.

B / ADOPT IF NEEDED

Use Twenty for a shared pipeline

Twenty supports opportunities, notes and linked tasks with due dates and assignees [2]. It could bring quote history and next actions together when the sheet becomes difficult to maintain.

Setup: illustrative 8 to 16 hours for a small clean import, a narrow pipeline and training, before integrations.

Recurring: hosting and maintenance require a separate quote. Client-owned instance, with an operator for updates and recovery. The documented 2 GB memory minimum is not a total price [3]. Review the v2.39.0 license and module exceptions [4].

C / DEFER

Build only when a specific gap is proven

A custom view could add company-specific quote rules or combine other systems. That need has not been established here. A build would need its own ownership, access, hosting and support scope.

Setup and recurring costs: not quoted. Ongoing testing and maintenance remain part of the decision. Client rights and dependency licenses need review.

Setup ranges are fictional planning assumptions, not vendor or OpenSauce quotes. Unknown costs stay visible.

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A two-week trial the owner can run

01 Prepare

Name one coordinator. Start with 20 open quotes in a client-owned sheet. Use quote references rather than sensitive job details and restrict sharing.

02 Assign

Add an owner, next action and next date for every quote. Review due actions each workday. Record the result after each contact.

03 Measure

Record a baseline week, then the two-week trial: time finding status, quote checks and overdue actions. Compare effort per check as well as totals.

04 Decide

Keep the sheet if every open quote has an owner/date and the team can maintain it. If coordination still fails, test the actual missed cases in Twenty before migrating.

Acceptance and recovery

The coordinator can identify overdue actions, a colleague can understand a quote without asking its owner, and the latest export opens independently. Make a copy before changes. Restore the prior sheet if the trial disrupts work.

Before a real recommendation: verify actual volume and time, existing access, the daily owner, data sensitivity and integration needs. These require discovery.

Primary sources

Checked September 13, 2026. Sources support product capabilities, not the fictional business estimates.

1. Google Sheets: conditional formatting
2. Twenty: standard objects and tasks
3. Twenty: hosting, persistence and recovery
4. Twenty v2.39.0: license and enterprise exceptions

Example assessment format / \$495 offer / Implementation is a separate decision