Back-Office Teardown

Hollis Grove Consulting, a 14-person B2B marketing consultancy in Chicago · prepared for Renee Calder and Marcus Bell · report TD-SAMPLE

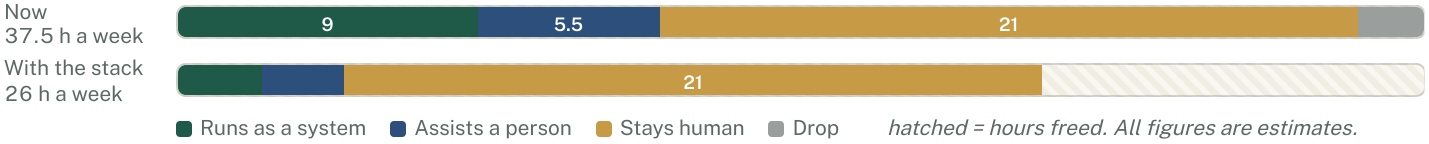
A fit. Your tools are the ones the standard install is built for. Close to a third of your back-office hours (an estimate) can move to a system or shrink to a review.

37.5 h
back-office hours a week in scope (estimate)

11.5 h
a week the five modules would take off your people (estimate, 31%)

21 h
a week stay human, by design (estimate)

$4,500
fixed-price install, then $1,500 a month to run



What we found

- Marcus spends about 25.5 hours a week on these duties, Renee about 6 and the bookkeeper about 6 (estimates). Together that is 37.5 hours a week.
- The five modules would take about 11.5 of those hours off your people each week (31%, an estimate). Most of it is inbox sorting, reply drafting, onboarding paperwork and invoice checking. Two duties can stop outright: the payments sheet and the clients master sheet.
- About 21 hours a week (56%, an estimate) stay with people by design: proposals, bookkeeping, invoicing, payroll and HR admin, and judgment calls with clients.
- Marcus's own load on these duties would fall from about 25.5 to about 14 hours a week (an estimate). That is the number to weigh against the full-time Operations Coordinator you posted for. This report does not decide it for you.
- Work tracking is not covered. Asana is not supported and the stack reads no time tracker. About 3 hours a week of chasing (an estimate) stay manual.

What fits

Google Workspace, HubSpot and QuickBooks Online are the supported set, and you use all three. All five modules would run in your tools: inbox sorting and drafts on ops@, invoice reminders from QuickBooks, enquiries from your Sitebuilder form into HubSpot, onboarding packs in Drive, and the Monday report. Everything that goes to a client or a vendor stays a draft that Marcus or Renee sends.

What does not fit

Asana, Harvest time tracking and vendor bills are outside the five modules. Harvest reminders and bill intake are fixed-price change orders if you want them later. Three of your four onboarding templates are Word files and become Google Docs. The stack never sends your engagement letter for signature, sends an invoice or records a payment. Those stay with your people.

The price and the plan

Install, fixed price	$4,500, or 3 payments of $1,600 ($4,800 in all)
Credit for this Teardown	$950 off if you sign within 30 days of receiving this report
Run, from the day install is complete	$1,500 a month for 14 staff, month to month

Next step

Book a call to go through this report and decide: https://calendar.app.google/2CjELh17om7j69hs5

How we got these numbers

Every hour figure in this report is an estimate. Volumes come from your exports and counts; minutes per task come from the interview. They are not measurements.

What we reviewed

- A tool list with plans, filled in by Marcus.
- The Operations Coordinator job posting.
- Six screenshots: the HubSpot pipeline, the inbox labels, the open invoice list, the enquiry form, the booking page and last week's Monday numbers.
- Three exports, counts and structure only: the receivables aging summary, the pipeline by stage and the nine questions on the enquiry form.
- Five templates: engagement letter, welcome letter, kickoff summary, information request, onboarding checklist.
- A one-week volume count from Marcus.
- A 45-minute video interview with Renee Calder and Marcus Bell.
- Everything arrived by a share link from your own Drive. We asked for no passwords and signed in to nothing.

One sample week, counted

- **Shared inbox:** 204 threads. 22 needed a reply, 9 a follow-up, about 3 were judgment calls.
- **Enquiries:** 6. Four new contacts, 3 new deals, 1 filtered as a sales pitch, 5 replies.
- **Wins:** 2 deals won. 2 onboarding packs of 4 documents (8 documents).
- **Invoices:** 13 open, $43,685. 10 overdue, $29,035. 6 reminders sent.
- **Overdue by age:** 1 to 7 days: 7 invoices, $20,050. 8 to 14 days: 1, $2,750. 15 to 30 days: 2, $6,235.
- **Payments:** 6, $38,450.
- **Pipeline:** 4 open deals worth $48,500: New enquiry 1 (no amount yet), Call booked 1 ($6,500), Proposal sent 1 ($24,000), Negotiation 1 ($18,000).

How to read the sorting

Runs as a system	The stack does the work. A person reviews it and approves anything that leaves the firm.
Assists a person	The stack prepares a draft or a list. A person finishes and sends it.
Stays human	Judgment, relationships or an action the stack never takes.
Drop	The duty can stop. It repeats data that already lives somewhere else.

Confidence is how sure we are of an hours figure.

High	Counted from an export or a count you gave us.
Medium	A person gave volume and minutes from last week.
Low	A recollection or a guess.

Your tools and where they stand

CATEGORY	TOOL	PLAN	FIT	NOTE
Email and calendar	Google Workspace	Business Standard	Supported	The only runtime the stack has.
Shared inbox	ops@ mailbox	Regular user account	Supported	Not a Google Group. Confirmed in the interview. One mailbox per install.
CRM	HubSpot	Starter	Supported	Connects through a private app you create.

CATEGORY	TOOL	PLAN	FIT	NOTE
Accounting	QuickBooks Online	Plus	Supported	Read only. Runs through Lampjar's Intuit app until handover.
Payments	QuickBooks invoice payment links	Included	Supported	No separate Stripe account to connect.
Forms	Sitebuilder enquiry form	Business	Supported	Emails each submission to ops@. Parsing is tested in the first session.
Booking	Online booking page	Free	Supported	Bookings land on Google Calendar, so the stack sees them read only.
Documents	Word (3) and Google Docs (1)	In your Workspace	Supported	Word templates become Google Docs at install.
E-signature	PandaDoc	Essentials	Not supported	By design. The stack never sends anything for signature.
Project management	Asana	Starter	Not supported	Not planned. Stays manual.
Time tracking	Harvest	Pro	Change order	Change order 16, $1,500, 8 business days. Optional. Not needed for the five modules.
Team chat	Slack	Pro	Change order	Change order 5, $900, 4 business days. Optional internal notices only.
Payroll and HR	Payroll and HR service	Not shared	Not supported	Out of scope for the standard install.

Supported: the standard install works with it. Change order: a fixed-price addition, quoted in this report. Not supported: the stack does not touch it, or never will by design. Decline: we would not take it on.

Whose week changes

PERSON	ROLE	NOW, H/WK (EST.)	WITH THE STACK, H/WK (EST.)	FREED, H/WK (EST.)
Marcus Bell	Operations manager	25.5	14	11.5
Renee Calder	Owner	6	6	0
Part-time bookkeeper	Bookkeeper, part time	6	6	0
Total		**37.5**	**26**	**11.5**

Your back office, flow by flow

Seven flows, plus the inbox that runs through all of them. Each shows how the work runs today, in your tools, in the words of the people who do it.

0 · Inbox and follow-ups

Partly covered by Module 01: Inbox triage and reply drafts
9.75 h now, 4.75 h with the stack (est.)

HOW IT WORKS TODAY (MARCUS BELL)

1. Marcus opens ops@ three times a day and sorts by hand into labels.
2. He writes most replies himself and keeps a mental list of mail nobody answered.
3. On Fridays he scans Sent for follow-ups.
4. He forwards client mail to the project lead and asks who owns it.
5. Complaints and disputes go to Renee.

TOOLS

Gmail (Google Workspace Business Standard), ops@ shared mailbox

VOLUME

One sample week: **204 threads**, 22 needed a reply, 9 needed a follow-up, about 3 were judgment calls.

WHERE IT HURTS

Sorting eats the morning. Follow-ups depend on memory and a Friday scan. Replies wait until Marcus reaches them.

WHAT THE STACK COVERS

Sorting, summaries, reply and follow-up drafts. It does not forward mail.

1 · Lead to client

Partly covered by Module 03: Intake and booking links to the CRM
4.75 h now, 4 h with the stack (est.)

HOW IT WORKS TODAY (MARCUS BELL AND RENEE CALDER)

1. The form emails ops@ from forms@sitebuilder.example.
2. Marcus retypes the details into HubSpot as a contact and a deal at New enquiry.
3. He replies with the booking link.
4. Renee runs the discovery call and writes the proposal.
5. Marcus moves the deal through Call booked, Proposal sent, Negotiation and Won or Lost.

TOOLS

Sitebuilder enquiry form (9 questions), HubSpot Starter, Google Docs

VOLUME

One sample week: **6 enquiries**, 4 new contacts, 3 new deals, 1 filtered as a sales pitch, 5 replies.

WHERE IT HURTS

Retyping. Replies go out when Marcus gets to them. Deal stages go stale between calls.

WHAT THE STACK COVERS

Enquiry to HubSpot contact and deal, reply draft with the booking link, a proposed move to Call booked. Calls, proposals and prices stay with Renee.

2 · Onboarding

Partly covered by Module 04: Onboarding packs from your templates
4 h now, 2.25 h with the stack (est.)

HOW IT WORKS TODAY (MARCUS BELL)

1. A deal is marked Won in HubSpot, sometimes a day late.
2. Marcus makes a client folder in Drive and fills four documents from the templates by hand.
3. He emails the welcome letter and sets the kickoff.
4. He sends the engagement letter for signature in PandaDoc and creates the customer in QuickBooks.
5. He shares the folder with the client.

TOOLS

Google Drive, Word (3 templates), Google Docs (1 template), PandaDoc, QuickBooks Online

VOLUME

One sample week: **2 deals won**, 2 packs of 4 documents (8 documents).

WHERE IT HURTS

An hour per pack, mostly retyping names and dates. Packs slip when the Won stage is late.

WHAT THE STACK COVERS

Folder, four filled documents, a checklist and a welcome draft. Sharing, signature and billing set-up stay with Marcus.

3 · Work tracking

Not covered
3 h now, 3 h with the stack (est.)

HOW IT WORKS TODAY (MARCUS BELL)

1. Project leads keep tasks in Asana and hours in Harvest.
2. Marcus chases late timesheets on Thursday and status updates on Monday.
3. He updates deadlines in Asana after client changes.

TOOLS

Asana Starter, Harvest Pro

VOLUME

About 14 people log time. Marcus chases several each week.

WHERE IT HURTS

The chasing is manual and awkward. Renee wants utilization numbers the sheets cannot give.

WHAT THE STACK COVERS

Nothing. Asana is not supported. Harvest reminders are a change order.

4 · Invoicing and collections

Partly covered by Module 02: Invoice chase
7.5 h now, 5.5 h with the stack (est.)

HOW IT WORKS TODAY (MARCUS BELL AND THE BOOKKEEPER)

1. The bookkeeper creates and sends invoices from QuickBooks and reconciles the bank.
2. Every Monday Marcus runs the aging report and checks Gmail to see whether the customer has written.
3. He writes a reminder from a saved template when an invoice is late.
4. He copies payment confirmations into a payments sheet.
5. Renee decides on the oldest overdue invoices.

TOOLS

QuickBooks Online Plus, QuickBooks invoice payment links, Gmail

VOLUME

Sample week: **13 open invoices, $43,685**. 10 overdue, $29,035. 6 reminders sent. 6 payments, $38,450.

WHERE IT HURTS

Reminders go out when Marcus has time, not on a schedule. The oldest overdue invoice ($6,200) has no owner decision yet at 30 days.

WHAT THE STACK COVERS

Reads open invoices and payments (read only), drafts reminders, asks Renee at day 30. It never creates, edits or sends an invoice or records a payment.

5 · Scheduling

Partly covered by Module 03: Intake and booking links to the CRM
2 h now, 1.75 h with the stack (est.)

HOW IT WORKS TODAY (MARCUS BELL)

1. New enquirers book a discovery call on the booking page. Bookings land on Renee's or Marcus's Google Calendar.
2. Marcus moves or cancels calls when people ask.
3. He arranges internal meetings and rooms for client workshops.

TOOLS

Google Calendar, Online booking page

VOLUME

About 8 calls booked or moved a week.

WHERE IT HURTS

Rescheduling by email, back and forth.

WHAT THE STACK COVERS

Reads the calendar to see a booked call and puts the booking link in a reply draft. It never creates, moves or cancels an event.

6 · Reporting

Partly covered by Module 05: Monday owner report
3 h now, 1.25 h with the stack (est.)

HOW IT WORKS TODAY (MARCUS BELL)

1. Every Monday Marcus builds the numbers for Renee by hand from QuickBooks, HubSpot and a sheet.
2. He keeps a clients master sheet that copies HubSpot fields.
3. Renee asks for utilization and margin when she needs them.

TOOLS

QuickBooks Online, HubSpot, Google Sheets

VOLUME

One weekly report, timed by Marcus at 45 minutes.

WHERE IT HURTS

The report is late when Monday is busy. The master sheet disagrees with HubSpot.

WHAT THE STACK COVERS

A Monday report with what needs Renee, cash, overdue by age, pipeline, what each module did, findings and time saved (an estimate). No profit, utilization or forecast.

7 · Vendor and admin

Not covered
3.5 h now, 3.5 h with the stack (est.)

HOW IT WORKS TODAY (BOOKKEEPER AND MARCUS BELL)

1. The bookkeeper enters vendor bills and tracks renewals in a spreadsheet.
2. Marcus handles new-hire setup, payroll approvals and the office.

TOOLS

QuickBooks Online, Email, A payroll and HR service

VOLUME

Steady, not counted.

WHERE IT HURTS

Renewals are remembered, not scheduled.

WHAT THE STACK COVERS

Nothing. Vendor bill intake and renewal reminders exist as change orders. Payroll and HR are out of scope.

Every recurring duty, sorted

Hours are per week and are estimates. “Now” is what the duty takes today. “After” is what is left (with the stack) for a person: review, finishing, or the duty itself if it stays human.

DUTY	WHO	SORTED AS	NOW H (EST.)	AFTER H (EST.)	CONF.	BASIS AND NOTE
0 · Inbox and follow-ups						
Read, sort and summarize the ops@ inbox Module 01	Marcus	Runs as a system	3.5	0.75	Medium	204 threads at about 1 minute each. With the stack, Marcus checks the labels and summaries at about 12 seconds a thread. It works 8 to 5 Central, Monday to Friday.
Write replies to clients, leads and vendors Module 01	Marcus	Assists a person	2.25	0.75	Medium	22 replies at about 6 minutes each. With the stack, a draft is waiting. He reads, edits and sends it in about 2 minutes.
Follow up on mail nobody answered Module 01	Marcus	Assists a person	0.5	0.25	Low	9 a week at about 4 minutes each. Today it depends on a Friday scan of Sent. With the stack, a draft appears after 3 business days without an answer.
Handle complaints, disputes and other judgment calls Module 01	Renee	Stays human	1.5	1.5	Medium	About 3 threads a week. The stack drafts nothing for these. It labels them and puts them in front of a person.
Forward client mail to the project lead and ask who owns it Module 01	Marcus	Stays human	1	1	Low	The stack labels but never forwards. Change order 7 ($900) would label threads for named people.
Look for dropped balls: unanswered threads, stale deals, overdue invoices Auditor	Marcus	Runs as a system	1	0.5	Low	The auditor lists items stuck in the Queue, invoices with problems and a sharp rise in overdue. It does not read every thread or judge stale deals, so some scanning stays.
1 · Lead to client						
Log new enquiries in HubSpot as a contact and a deal Module 03	Marcus	Runs as a system	0.75	0.25	Medium	6 enquiries at about 7 minutes each, retyped from the form email. With the stack, the records wait in the Queue for approval, about 1 minute each to check.
Reply to new enquiries with the booking link Module 03	Marcus	Assists a person	0.5	0.25	Medium	5 replies at about 5 minutes each. With the stack, the draft has the booking link in it.
Move deals between stages after calls and proposals Module 03	Marcus	Stays human	0.5	0.5	Medium	About 5 moves a week. The stack proposes only the move to Call booked. Every other move is a person's.
Write proposals and price the work	Renee	Stays human	3	3	Medium	Judgment and relationships. No module touches it.
2 · Onboarding						
Create the client folder and fill the four onboarding documents Module 04	Marcus	Runs as a system	2	0.5	Medium	2 packs a week at about 60 minutes each. With the stack, the folder and four documents appear when the deal reaches Won. Marcus reviews them and fills the few fields left blank.

DUTY	WHO	SORTED AS	NOW H (EST.)	AFTER H (EST.)	CONF.	BASIS AND NOTE
Write and send the welcome email Module 04	Marcus	Assists a person	0.5	0.25	Medium	A draft is waiting in Gmail. He sends it.
Send the engagement letter for signature and set up the customer in QuickBooks	Marcus	Stays human	1	1	Medium	The stack never sends for signature and never writes to QuickBooks.
Share the client folder and give the client access to tools	Marcus	Stays human	0.5	0.5	Medium	The stack never shares a file or changes a permission.
3 · Work tracking						
Chase the team for hours in Harvest	Marcus	Stays human	1.5	1.5	Low	Change order 16 ($1,500) would add reminder drafts. It is not in the install.
Update project status and deadlines in Asana	Marcus	Stays human	1.5	1.5	Low	Asana is not supported.
4 · Invoicing and collections						
Create and send invoices	Bookkeep	Stays human	2.5	2.5	Medium	The stack never creates or sends invoices.
Write overdue-invoice reminders Module 02	Marcus	Assists a person	0.75	0.25	Medium	6 a week at about 8 minutes each. With the stack, drafts appear at 3, 7, 14 and 30 days overdue. Amounts and payment links come from QuickBooks.
Pull the aging list and decide whom to chase Module 02	Marcus	Runs as a system	1	0.25	Medium	Every Monday: run the report, check whether the customer has written, decide. With the stack, that check is done and the invoices that need a person are held.
Record payments and reconcile the bank	Bookkeep	Stays human	2	2	Medium	The stack never records a payment or touches the books.
Handle disputed invoices and payment plans	Renee	Stays human	0.5	0.5	Medium	Day 30 is the owner's decision. The stack puts it in front of Renee.
Copy payment confirmations into a payments sheet	Marcus	Drop	0.75	0	Low	QuickBooks already records every payment (6 last week). The sheet repeats it.
5 · Scheduling						
Offer call times, book and move discovery calls Module 03	Marcus	Assists a person	1	0.75	Low	About 8 calls booked or moved a week. New enquiries get the booking link in the draft. Moving or cancelling a call stays with a person: the stack never creates or moves a calendar event.
Coordinate internal meetings and rooms for client workshops	Marcus	Stays human	1	1	Low	Nothing to automate.
6 · Reporting						
Build the Monday numbers for Renee Module 05	Marcus	Runs as a system	0.75	0.25	High	Marcus timed it at 45 minutes. With the stack, the report arrives at 7:00 on Monday. He checks the figures against QuickBooks and HubSpot.
Answer Renee's questions on utilization, margin and pipeline	Renee	Stays human	1	1	Low	Needs time tracking data the stack does not read. Change order 12 ($1,200) could add one section.

DUTY	WHO	SORTED AS	NOW H (EST.)	AFTER H (EST.)	CONF.	BASIS AND NOTE
Keep a clients master spreadsheet that copies HubSpot fields	Marcus	Drop	1.25	0	Low	HubSpot is the record. The pipeline section of the Monday report replaces the numbers the sheet carries.
7 · Vendor and admin						
Enter vendor bills and track renewals	Bookkeep	Stays human	1.5	1.5	Medium	Change order 10 ($1,200) would list incoming bills for the bookkeeper. Nothing would be entered or paid.
HR admin, payroll approvals, new-hire setup and office	Marcus	Stays human	2	2	Low	Out of scope for the standard install.
Total, all duties			**37.5**	**26**	**11.5 h freed (est.), 31%**	

By sorting

SORTED AS	DUTIES	NOW, H/WK (EST.)	SHARE OF HOURS	WITH THE STACK, H/WK (EST.)
Runs as a system	6	9	24%	2.5
Assists a person	6	5.5	15%	2.5
Stays human	15	21	56%	21
Drop	2	2	5%	0
All duties	**29**	**37.5**	**100%**	**26**

The five modules in your tools

Everything that goes to someone outside your firm is a draft that a person sends. Finance is read only. Nothing is deleted, shared or scheduled by the stack. Every install starts with 30 days in shadow mode, where it changes nothing outside its own sheet.

MODULE 01 Inbox triage and reply drafts

Fits

IN YOUR TOOLS IT WOULD

- Sort ops@ every working hour, 8 to 5 Central, Monday to Friday, into labels under BO/.
- Write a one-line summary per thread into a daily digest.
- Prepare a reply draft in Gmail for clients, leads and vendors, and a follow-up draft after 3 business days without an answer.
- Send complaints, disputes and legal or personal threads to a person with no draft.

IT WOULD NOT

- Send anything. Marcus or Renee sends every draft.
- Sort overnight or at weekends.
- Read anyone's mailbox but ops@. A second mailbox is change order 1 ($750).
- Forward mail to project leads, or handle attachments.

Duties it touches: Read, sort and summarize the ops@ inbox; Write replies to clients, leads and vendors; Follow up on mail nobody answered. Hours freed: 4.5 h a week (estimate).

MODULE 02 Invoice chase

Fits

IN YOUR TOOLS IT WOULD

- Read open invoices and payments from QuickBooks Online, read only.
- Prepare one reminder draft per customer at 3, 7, 14 and 30 days overdue. Several late invoices become one email.
- At day 30, put an owner decision in front of Renee and send her one internal email.
- Hold an invoice for a person when there is no billing email, the customer wrote in the last 7 days, or a sensitive thread is open. Skip invoices under $50.

IT WOULD NOT

- Create, edit or send an invoice, record a payment, reconcile or refund.
- Let an AI model write an amount. Amounts, dates and payment links come from QuickBooks.
- Handle disputes, payment plans or write-offs.

Duties it touches: Write overdue-invoice reminders; Pull the aging list and decide whom to chase. Hours freed: 1.25 h a week (estimate).

MODULE 03 Intake and booking links to the CRM

Fits, with a condition

IN YOUR TOOLS IT WOULD

- Read the Sitebuilder notification in ops@ and create a HubSpot contact and a deal at New enquiry. At first these wait for approval in the Queue.
- Fill empty HubSpot fields. Never overwrite what a person typed.
- Prepare a reply draft with your booking link.
- Read the calendar and propose the move to Call booked once a call is on it.

IT WOULD NOT

- Create, move or cancel a calendar event.
- Qualify a lead, run a call, write a proposal or mark a deal Won.
- React the moment a booking happens. It sees the booking on the next calendar scan. Instant updates are change order 6 ($900).

Condition. The Sitebuilder notification must parse. We test it on a real notification in the first working session. If it does not parse, the fix is a setting, not a change order.

Duties it touches: Log new enquiries in HubSpot as a contact and a deal; Reply to new enquiries with the booking link; Offer call times, book and move discovery calls. Hours freed: 1 h a week (estimate).

MODULE 04 Onboarding packs from your templates

Fits, with a condition

IN YOUR TOOLS IT WOULD

- When a HubSpot deal reaches Won, make a client folder in your Drive. It is not shared.
- Fill your four documents from your templates: welcome letter, kickoff summary, information request, onboarding checklist.
- Show a missing value as [fill in: field] so a person sees the gap.
- Add a checklist to the Queue and a welcome-email draft to Gmail.

IT WOULD NOT

- Share the folder, send anything for signature, set up billing or give tool access.
- Review contract wording. Your engagement letter is not one of the four documents.
- Make a pack for a deal won before go-live.

Condition. Three of the four templates are Word files. They become Google Docs with merge fields during the install. Marcus has said Won is sometimes marked a day late. The auditor flags a won deal with no pack after 2 days, so you will see it.

Duties it touches: Create the client folder and fill the four onboarding documents; Write and send the welcome email. Hours freed: 1.75 h a week (estimate).

MODULE 05 Monday owner report

Fits

IN YOUR TOOLS IT WOULD

- Send one internal email on Monday at 7:00 to Renee and Marcus.
- Show what needs the owner, cash collected, outstanding and overdue by age, the oldest overdue invoices, pipeline moves, what each module did, open findings, time saved with its method printed, and model cost.
- Read QuickBooks and HubSpot read only.

IT WOULD NOT

- Report profit, utilization or a forecast. It reports what the stack did.
- Read Harvest. A utilization section is change order 12 ($1,200).

Duties it touches: Build the Monday numbers for Renee. Hours freed: 0.5 h a week (estimate).

ALWAYS ON Daily auditor

Fits

IN YOUR TOOLS IT WOULD

- Check at 5:00 every day that each module ran and no run failed.
- List settings that look wrong, items stuck in the Queue, invoices with problems and a sharp rise in overdue.
- Email Marcus once when it finds something serious.

IT WOULD NOT

- Fix anything by itself.
- Read every thread or judge a stale deal.
- Watch tools it is not connected to.

Duties it touches: Look for dropped balls: unanswered threads, stale deals, overdue invoices. Hours freed: 0.5 h a week (estimate).

Risks and dependencies

RISK	WHAT COULD GO WRONG	WHAT WE DO ABOUT IT
Word templates	Three of four onboarding templates are Word files. The stack fills Google Docs.	We convert them to Google Docs with merge fields during the install and deliver them as part of the handover. Renee's counsel reviews contract wording, not us.
Won is marked late	Marcus says about one won deal in five is moved to Won a day late. A late move means a late onboarding pack.	Moving to Won stays the trigger. The auditor flags a won deal with no pack after 2 days. We agree one rule with Marcus at kickoff.
One invoice cannot be chased	One open invoice ($1,450) has no billing email on the customer record. Another is $35, under the $50 minimum.	The first is held for a person until an email is added. The second is skipped by design and listed in the report.
QuickBooks is the connection most likely to need care	Intuit connections can expire or be revoked. If that happens, the invoice module stops.	We connect it first. The auditor reports a stopped connection the next morning. It runs through Lampjar's Intuit app until handover, then you switch to your own app.
Draft quality is unproven until shadow mode	We cannot judge drafts in Renee's and Marcus's voice from exports. The estimates in this report are not measurements.	Thirty days of shadow mode on your real mail. Each module passes its own test before anything goes live, and you can turn shadow mode back on at any time.
One operator	Marcus is the operator and the approver of most drafts. If he is away, drafts wait.	Name a second approver at kickoff. If you hire the Operations Coordinator, that person takes the operator role.

What does not fit the standard install

ITEM	HOURS NOW, H/WK (EST.)	WHAT HAPPENS TO IT
Asana tasks, deadlines and status	1.5	Asana is not supported and not planned. Stays with Marcus.
Time tracking in Harvest	1.5	Change order 16, $1,500, adds reminder drafts to people who have not logged time. Optional. Not in the install price.
Vendor bills and renewals	1.5	Change order 10, $1,200, lists incoming bills for the bookkeeper to enter. Optional. Not in the install price.
Engagement letters and e-signature	1	The stack never sends for signature or writes to your books. Stays with Marcus.
Payroll and HR admin	2	Out of scope. We do not offer it.

The three honest outcomes of a Teardown

A fit (this report)
Your tools and duties fit the standard install. A proposal is in this report.

A priced build or a decline
One or more of your core tools is outside the standard install. A build is quoted separately, or we decline.

A plain no
Most of your hours are people, phones or reception. A system would not carry them, so we do not propose an install.

Every Teardown ends in one of these. The report says which, before you pay for anything else.

Install proposal

All five modules and the daily auditor, installed in Hollis Grove's own Google Workspace and connected to your HubSpot, your QuickBooks Online (read only) and your own Anthropic account. Your four onboarding templates are adapted and kept as Google Docs. Delivered with a handover document and a recorded training session of about 45 minutes. You own all of it, and keep it if you cancel.

ITEM	PRICE	TERMS
Install, all five modules and the auditor, fixed price	**$4,500**	One payment before kickoff.
Or pay in three	**3 x $1,600**	$4,800 in all.
Less: credit for this Teardown	**minus $950**	If you sign within 30 days of receiving this report. Taken off the total either way.
Install after the credit	**$3,550**	Or $3,850 if you pay in three.
Run, from the day install is complete	**$1,500 a month**	14 staff. $1,200 a month under 10 staff. Month to month, 30 days' notice.
First twelve months at Lampjar	**$21,550**	$4,500 install plus 12 months of Run at $1,500, less the $950 credit. Your own AI usage is extra.

Timeline

WITHIN 5 BUSINESS DAYS OF SIGNING
1. Kickoff
A 45-minute call. We agree the operations lead and the approver.

WEEKS 1 TO 3
2. Install in your accounts
Five working sessions. Your people click wherever an account or a permission is involved. Your accounts, your keys, your copy.

INSTALL COMPLETE, 2 TO 3 WEEKS IN
3. Shadow mode starts
All five modules read and decide, and change nothing outside the sheet. Run begins.

30 DAYS
4. Shadow check
A 20-minute review each week. Each module must pass its own test on your real mail, invoices and deals.

AFTER THE CHECK
5. Live
You sign the go-live checklist. Drafts start to appear in your Gmail. Free fixes for 30 days.

Shadow mode starts 2 to 3 weeks after kickoff. The first live draft in your Gmail comes after the 30-day check, so about 5 to 8 weeks after kickoff. The Run fee during shadow mode pays for the monitoring and the weekly reviews, not for live drafts.

What you do, and what Run covers

What we need from you

- An Anthropic account and key, created by you.
- A HubSpot private app, created by you.
- A QuickBooks connection, approved by your QuickBooks admin.
- Google Workspace consent for the ops@ mailbox.
- A named operations lead (Marcus) and a named approver (Renee).
- Marcus's time for a 45-minute kickoff and five working sessions of about an hour each (an estimate).

What Run covers, at $1,500 a month

- Daily check and health monitoring; I review what it flags on business days.
- Fixes to defects, and repairs after routine changes in a connected tool.
- The Monday report.
- One 20-minute call a month with a short written summary.
- Two hours of written advice a month, by email.
- A quarterly review of who has access.
- Replies within 1 to 2 business days. No phone, no weekends, no on-call.

Costs you pay directly

- Anthropic usage on your own account. Our estimate is low dollars to low tens of dollars a month. It has not been measured on a live firm.
- Your existing Google Workspace, HubSpot and QuickBooks plans. No new tool subscriptions.

Optional later: fixed-price change orders

Not part of the install price. Each is built on request at the fixed price, runs in shadow mode first, and is quoted again in writing before it starts.

#	CHANGE ORDER	PRICE	BUSINESS DAYS	WHY IT CAME UP
7	**Shared-inbox routing**	$900	4	Marcus forwards client mail to project leads today. This would label threads for named people. It would not forward them.
16	**Time tracking reminders (Harvest or Toggl Track)**	$1,500	8	Chasing hours in Harvest is manual. This would draft the reminders and add logged hours to the Monday report.
10	**Vendor bill intake for the bookkeeper**	$1,200	5	Vendor bills reach the bookkeeper by email. This would list them in a sheet for her to enter. Nothing is entered or paid.

Next step

Book a call to go through this report and decide: https://calendar.app.google/2CjELh17om7j69hs5

You have one round of follow-up questions, in writing, for 10 business days after you receive this report. The $950 credit holds for 30 days.

This report is operations advice, not legal, tax, accounting or employment advice, and it guarantees no result. Hour figures are estimates. Under the Teardown Terms you own this report. Lampjar keeps its methods and templates.