

A walk from inquiry to payment

MODEL

The Bottleneck

BUILT ON

The Goal (E. Goldratt, J. Cox) · High Output Management (A. Grove) · Lean Thinking (J. Womack, D. Jones) · We Don't Make Widgets (K. Miller)

Goal. This template helps you find the one place where work in your business waits the longest. You walk one paid job from the first contact to the money in your account, and at each stage you write down how long the work took and how long the job sat. At the end, you know which stage should get your time in the next 30 days, before you buy anything or hire anyone.

In 15 minutes. (our estimate, not measured) To be honest: in 15 minutes you walk the job from memory. It is a hypothesis about the bottleneck, not a measurement. The real walk through your email, calendar and invoices is the full version.

1. (2 min) Pick one typical paid job from the last three months and write what one job is (A).
2. (5 min) From memory, list six stages (B). For each, write how many days a job usually sat, and how many similar cases are waiting today.
3. (3 min) Mark two signals: where the queue is, and who or what people and clients wait for (C). The bottleneck is where they agree.
4. (3 min) Write one sentence about the bottleneck (D) and choose one move that costs nothing (E).
5. (2 min) Write one line: "I decide that ... Who ... By when ... I will check ...", with the check from part F. Add: "a hypothesis from memory; I will confirm it by walking the trail."

Instructions (full version) (estimate: 1 to 1.5 hours if you have the job's trail at hand, plus two short conversations in step 3; we have not measured this)

1. Pick one typical job from the last three months that has already been paid. Open your email, calendar, CRM or spreadsheet, and the invoices.
2. Follow the trail of that job, stage by stage. At each stage, write down two numbers: how long the work itself took and how many days the job sat before it moved on. Add how many similar cases are waiting there today and how many days the oldest one has been waiting.
3. Ask two people who keep an eye on deadlines who or what they wait for most often. Mark the three signals. The bottleneck is where at least two of them agree.
4. Write one sentence about the bottleneck and work out how much money is waiting in front of it.
5. Choose two moves that cost nothing and one rule for the rest of the business. Write down a person and a date. Put purchases and hiring on hold until the check after 30 days.

Template fields

A. The unit

- One finished and paid job is: _____

- Paid jobs in the last 90 days: ____ · Average invoice: ____ PLN · Lead time promised to clients: ____ days

B. The walk: one paid job

No.	Stage	Who	Work (hrs)	Sat (days)	Waiting today	Oldest (days)	Needs you?
1	inquiry						
2	quote						
3	client's decision						
4	start						
5	delivery						
6	your approval						
7	handover						
8	invoice						
9	payment						

Total: work ____ hrs · the whole path ____ days. Change the stages to your own; 6 to 9 is enough.

C. Three signals

Signal	Question	Stage
Queue	Where do the most cases wait, or the oldest one?	
Waiting	Who or what do people and clients wait for most often?	
Hours	Where are more hours a week needed than there are? (if you can count it)	

Bottleneck (two of three): ____ Type: ☐ a person or role · ☐ a rule ("everything goes through me", "invoices once a month") · ☐ the market (too few inquiries: then the next step is sales, not processes)

D. One sentence "Today the pace of my business is set by ____, which is done by _____. ____ cases are waiting, the oldest for ____ days." Money waiting in front of the bottleneck: ____ cases × ____ PLN (× ____% of quotes accepted, if inquiries are waiting rather than orders) = ____ PLN

E. Moves for 30 days

Move	What exactly	Who	By when
1 Squeeze (no cost)			
2 Squeeze (no cost)			
3 The rest serves the bottleneck (rule)			
Only then (cost)	a tool, AI, outsourcing, a new hire		decision after 30 days

Hints: fixed hours just for this stage · a list of things to prepare before a case gets there · first, whatever turns into payment fastest · hand off what doesn't need to go there · spot-check, don't check everything.

F. A number for every week

- Cases waiting in front of the bottleneck and the age of the oldest: ____
- Paired quality measure (rework, returns, complaints): ____
- Check: ____ (in 30 days) · new walk: ____ (in 90 days)

Fictional example (the firm and the numbers are fictional, for this template)

An air-conditioning installation firm, 11 people.

A. Unit: an installation finished with a sign-off and paid. 46 in the last 90 days. Average invoice 9 000 PLN. Promised lead time: 3 weeks from inquiry to installation.

B.

No.	Stage	Who	Work (hrs)	Sat (days)	Waiting today	Oldest (days)	Needs you?
1	inquiry	office	0.2	1	3	2	no
2	site visit	technician	1.5	4	6	7	no
3	quote	owner	1	9	14	16	yes
4	client's decision	client	0	6	11	14	no
5	equipment order	office	0.5	3	2	3	no
6	installation	crew	8	5	4	6	no
7	sign-off	crew	0.5	1	1	1	no
8	invoice	office	0.2	12	9	18	no
9	payment	client	0	10	7	21	no

Total: work about 12 hrs · the whole path 51 days.

C. Queue: quote (14 inquiries, the most in the firm). Waiting: the technician and the office say they wait for the boss's pricing; clients call about their quote. Hours: quotes need about 9 hrs a week, and the owner has about 4 for them. **Bottleneck: the quote, three signals out of three.** The oldest case sits at payment (21 days), but only one signal fits there. Type: a person and a rule ("I price every quote myself").

D. "Today the pace of my business is set by preparing quotes, which I do myself. 14 inquiries are waiting, the oldest for 16 days." Money waiting: $14 \times 9\,000 \text{ PLN} \times 40\% \approx 50\,000 \text{ PLN}$.

E.

Move	What exactly	Who	By when
1 Squeeze	two fixed blocks for quotes, Tuesday and Thursday from 7 to 9 a.m., phone on silent	owner	from Monday
2 Squeeze	an installation price list for up to two units; the technician sends standard quotes directly after the site visit, and only unusual ones go to the boss	owner, technician	in 2 weeks
3 The rest serves the bottleneck	after the site visit, the technician fills in a checklist: photos, dimensions, capacity, preferred date; without the full set, the case doesn't go on to a quote	technician, office	from tomorrow
Only then	quoting software or AI to draft the quote, if the queue doesn't drop below 5	owner	decision after 30 days

Separately, outside the bottleneck: an invoice within 2 days of the sign-off instead of once a month. It won't add installations, but it will bring the money in sooner.

F. The number: inquiries waiting for a quote and the age of the oldest (today 14 and 16 days). Paired quality measure: quotes corrected after sending. Check in 30 days, new walk in 90 days.

From us. The ideas come from books: Eliyahu Goldratt and Jeff Cox (The Goal) give the bottleneck and the order of moves: first squeeze it fully, then make everything else serve it, and expand at a cost last; James Womack and Daniel Jones (Lean Thinking) give mapping one product's path step by step and the view of how small a share of that path is work; Ken Miller (We Don't Make Widgets) the split between work time and elapsed time and a clear unit to count; Andy Grove (High Output Management) a pair of indicators, quantity and quality. What we added are the three signals (queue, waiting, hours), counting the money waiting in front of the bottleneck, and 30-day moves with a person and a date.

When to call us.

- Two of the three signals point to different stages, or none agree.
- The bottleneck is the market: there are too few inquiries, so rules in the process won't help.
- After 30 days the queue in front of the bottleneck hasn't dropped, and only moves with a cost are left: a tool, AI, outsourcing or a new hire.

The first call (30 minutes) is free. We will go through your walk and see whether you found the right bottleneck.

Prompt for your AI. Paste it into your own ChatGPT, Claude or Gemini account; our own method, working from your company's knowledge, is what we do in a Diagnosis.

You are a calm coach for the owner of a small business. Walk me through the

"Walk from inquiry to payment": one question at a time, wait for my answer.

At the start, remind me: "Do not paste passwords, account numbers or personal data."

Order: 1) one typical paid job from the last three months; 2) six to nine stages from inquiry to payment: for each, how many days the job sat and how many similar cases wait today; 3) two signals: where the queue is, and who or what people wait for; 4) one sentence about the bottleneck; 5) one move that costs nothing.

Tell me plainly this is a sketch from memory, not a measurement. If an answer is vague, ask for a number or an example. Never invent facts about my business; if you don't know something, ask.

At the end, write one line: "I decide that ... Who ... By when ... I will check ...".

Want to do it with us?

Found the bottleneck? In the 90-Day Program, we remove it together with you, with a scoreboard every week.

We'll go through your template on a 30-minute call. Free of charge.

aic-site.chmura-mac.workers.dev/en/contact/

The examples in the templates are fictional. The times given with the instructions are our estimates, not measurements.