



Custom Manufacturing Discovery Guide

For Reseller Channel Partners | Custom Manufacturing & Job Shop Production

Purpose

To assist you in guiding an authentic conversation with an owner or operations leader of a custom manufacturing enterprise, rather than delivering a sales pitch. The objective is to enable them to articulate, in their own words, the costs associated with managing custom and unique work on ad hoc systems, including time, financial expenditure, managerial overhead, and the confidence required to quote and fulfill complex projects. People often shift their perspective when they say their challenges out loud.

How To Use This Guide

Each section covers a pain point we frequently see in custom manufacturing and job shop businesses. For every section, you will find three parts: **The Setup** describes what these pain points look like day-to-day in a custom shop. **Discovery Questions** are open-ended questions you can choose to ask the owner. And **Why This Matters** is a short, honest bridge to how Results can help.

1. The Patchwork Systems Trap

The Setup

Custom manufacturers often end up running their business across five or six different tools that were never designed to work together. A CRM for tracking customers, spreadsheets for scheduling, QuickBooks stretched far beyond what it was built for, maybe a separate time tracking tool. None of them talk to each other, so someone has to manually carry information from one system to the next, and that person becomes a single point of failure.

Discovery Questions

- How many different systems or spreadsheets does a single job typically touch, from the first estimate to the final invoice?
- How many times does one piece of information need to be re-entered into a system?

- When you need the full picture of what is happening on a job right now – the estimate, the schedule, the materials ordered, the labor logged – how many places do you have to look?
- Has your team ever tried to force an off-the-shelf accounting or CRM tool to do something it was not built for, just to make it work for your business?
- What happens when the person who knows how to make all these tools talk to each other is out sick or leaves the company?
- If you had to describe your current setup to someone new, how long would it take before you got to the phrase and then we also use?

Why This Matters

Results is built to run the whole job- estimating, scheduling, purchasing, production, field work, and invoicing- from a single system. Enter something once, and it flows through to everywhere it is needed, instead of being retyped into the next tool in the chain.

2. The Custom Estimate Bottleneck

The Setup

When every job is different, building an accurate quote becomes a project in itself. A single estimate might include dozens of individual products and processes, and each of those products and processes can be made up of ten, twenty, or more line items of labor and materials underneath it. Getting all of that to roll up into something clean and understandable for the customer, without losing the detail your team needs to actually build it, can eat hours that should have taken minutes.

Discovery Questions

- Walk me through what it takes to put together an estimate for one of your more complex jobs, from a blank page to something you would actually send a customer.
- How much of that time is spent doing the underlying math and organizing, versus actually thinking through the best way to build the product?
- If a customer asks for a small change mid-quote, how much of the estimate do you have to redo?
- Do your estimates show your customer a clean total, or do they see all of the underlying detail whether they want it or not?
- Do customers ever want multiple estimates for the same job, each with different options? How do you currently handle that?
- How often does a quote take so long to prepare that you worry about losing the job to a competitor who can turn one around faster?

Why This Matters

Results lets you build a complex estimate from the same detailed line items your team already uses, then roll that detail up into clean, customer-facing groups. The backend complexity remains available to your team without overwhelming the customer. Additionally, if multiple estimates have been created for one job, each can be converted into the final awarded job or combined to create an entirely new one for the customer to approve. Nothing needs to be retyped.

3. Sequential Production And Capacity Scheduling

The Setup

Custom production rarely happens in one step. Design has to happen before cutting, cutting before assembly, and materials have to be on hand before any of it starts; if any part of that chain depends on a specific tool, workstation, or certified team member, the whole job waits on that resource's availability. Some custom manufacturers also send teams to the customer's site for installation or fitting, adding a field-scheduling layer on top of the shop floor.

Discovery Questions

- Walk me through the steps a typical job goes through from design to finished product. Which of those steps absolutely have to happen in order?
- How do you currently know whether a specific tool, workstation, or team member is available for the next step in a job?
- Has a job ever been ready for the next step, but stuck waiting because the right tool or the right person was tied up on something else?
- If your team also does work out in the field, how do you coordinate that with what is happening back at the shop?
- When something changes, a crew calls in sick, a part is delayed, a customer moves their date, how much manual rework does that create for you?

Why This Matters

Results lets you build a process once that reflects your real sequence of steps, and schedule against the actual capacity of your tools, workstations, and people. When something shifts, you can see it and adjust it, instead of rebuilding the plan from scratch. Additionally, in Results, you can create as many processes as you need, with specified handoffs and timely notifications so the job flows seamlessly from one team member to the next all the way through completion. Each team member only sees what they need to see and work on.

4. Materials, Purchasing, And Costing One-of-a-Kind Work

The Setup

A lot of custom manufacturing runs on materials that will never be bought again in that exact combination: a specific fabric, a specific finish, a one-time quantity of a part. Traditional inventory systems and bills of materials assume you are building the same thing repeatedly. When every job is different, forcing that structure onto your business creates more overhead than it saves.

Discovery Questions

- When you buy materials for a custom job, do you track them as inventory, or would you rather they were costed straight to the job the moment they arrive?
- Have you ever tried to use a standard bill of materials or assembly feature in your accounting software, only to find it breaks down because every job is a little different?
- How confident are you that the cost of materials on a finished job actually reflects what you paid for them?
- How much time does your team spend creating purchase orders for one-time materials, and does that process feel efficient?

Why This Matters

Results lets you purchase and cost materials the way custom manufacturing works: received and costed directly to the job, without forcing every purchase into a rigid inventory or bill of materials structure that does not fit one-of-a-kind production.

5. Growth That Outpaces Your Systems

The Setup

In a lot of custom shops, growth gets absorbed by adding people rather than better systems: another coordinator, another project manager, another person whose job is mostly to track down information and keep things moving. That works for a while, but it adds real overhead and does not scale forever.

Discovery Questions

- As your business has grown, has your headcount grown faster in production, or in the people needed just to coordinate and manage the work?
- What is one role in your company today that exists mostly to track down information or keep different systems and people in sync?
- If you took on twice the job volume next year without changing anything else about how you operate, what would break first?
- Is there a point where you believe your current way of running the business simply could not handle more growth? Do you know where that point is?

- Can you confidently go on vacation and know that the work will keep flowing and on track?

Why This Matters

Results is built to scale with the complexity of the business, not just the size of it. The same system that manages a single job can manage a much larger volume of custom, multi-step work, without needing a proportional increase in people whose only job is coordination. Visibility and accountability also go through the roof.

6. Team Accountability And The Owner's Peace Of Mind

The Setup

When job information lives in someone's head, in a spreadsheet, or in a conversation from yesterday, the owner ends up holding it all together. Getting an honest answer about where a job stands often means asking around, and it puts a lot of pressure on the owner to be the single source of truth.

Discovery Questions

- Right now, if you wanted to know the exact status of every active job in your shop, how would you find that out, and how long would it take?
- How much of your day goes toward tracking down information, versus actually running or growing the business?
- If you were unreachable for a week, how confident are you that jobs would keep moving the way you would want them to?
- When something falls behind schedule, is it usually obvious why, or do you have to dig to find out?
- How close is your business today to entering something once, then simply telling the system what you need it to do next?

Why This Matters

Results gives everyone, owner included, a single live view of every job, every task, and every dependency. The business runs on the system's information instead of running on what is in one person's head.

7. Good Fit Signals

Not every custom manufacturing business is ready for a conversation about Results today, and that is fine. These signals are a gut check to help you read the room before or during discovery, not a scorecard to fill out.

Strong Signals A Prospect Is A Good Fit

- The business builds custom, one of a kind, or highly configurable products, not the same standardized item repeated at volume.

- Production or fulfillment involves multiple sequential steps- design, cutting, assembly, installation- that depend on specific tools, workstations, or specialized team members.
- The business is currently running on a patchwork of tools, a stretched version of QuickBooks, spreadsheets, a basic CRM, rather than one integrated system.
- Estimating or quoting complex jobs currently takes hours or days, and that time is a competitive disadvantage.
- The business has both a production or shop side and a field service or install side, and struggles to coordinate the two.
- The owner or GM has already spent real money trying other software that did not deliver.
- Growth has meant adding more coordinators or project managers rather than better systems.
- Institutional knowledge about how to run a job lives mostly in the owner's or a few key employees' heads.

Signs There May Be Significant Friction In The Daily Operations

- Estimates are inconsistent from job to job because there is no standardized way to build them.
- Materials get purchased without a clear system for tracking what was actually ordered, received, or used on a specific job.
- Jobs stall waiting on a specific tool, workstation, or team member with no visibility into when they will be free.
- Labor hours or job costs are tracked loosely, relying on memory or informal notes rather than a documented system.
- The business has had to add management specifically to manually coordinate work between systems or departments.
- Customers are quoted delivery timelines that the shop later struggles to hit, because production sequencing was not clearly planned.

Signals It May Be Too Early

- A very small operation building simple, repeatable products with little sequencing complexity. The pain this guide surfaces may not exist yet for them.
- A business that already has a well-functioning integrated system covering estimating, scheduling, purchasing, and production, and is not experiencing the pain points above.
- An owner who is not open to documenting or enhancing internal processes at all. Because Results is highly configurable, it works best for businesses willing to document and build out ideal workflows, not just swap one off-the-shelf piece of software for another.

8. Closing The Conversation: What Life After Results Can Sound Like

Once an owner has talked through a few of these pain points, it helps to paint a picture of what changes. Based on how existing custom manufacturing customers describe it; here are a few shifts worth mentioning.

- Enter it once, and the system carries it everywhere it needs to go, instead of retyping the same information into five different tools.
- A complex estimate that used to take hours rolls up into a clean, professional quote in a fraction of the time, without losing any of the underlying detail your team needs.
- Scheduling shifts from guesswork to visibility; you can see exactly what tool, workstation, or team member is available for the next step.
- Growth stops meaning "hire another coordinator". The system absorbs increasing complexity without a proportional increase in management overhead.
- No matter how complex or custom the work is, the system flexes to match the business, instead of the business bending itself to fit the software.
- The shop floor and the field crew work off the same live information, instead of two separate worlds that have to be manually reconciled.
- Materials get costed the way the business actually buys them, without forcing one-time purchases into a rigid inventory structure.
- The owner stops being the single point of failure for institutional knowledge. Onboarding, job tracking, and day-to-day handoffs run through the system instead of living in one person's head.