

Logistics Firm Case Study

At A Glance

A logistics consulting firm was hired by a client to help define and communicate its current maturity level and prioritize action steps to meet their rapid growth goals. This definition and plan aided strategic planning visibility, implementation, and accountability.

The client now has clear action steps and continues to making strides quarter over quarter.

Key Metrics

Unrealistic growth goals were not the client's issue, but rather, structure and execution. So an objective current state, clear accountability, and tactical actions were identified and implemented.



3.2
Maturity Level



67
Net Capacity Score

CHALLENGES

- Logistics is a highly variable and fast-paced industry. Strategic adjustments need to be made quickly.
- The firm had stable revenue but lacked a defined sales process and structured business principles.
- Teams were overly optimistic in their self-reporting, despite operational deficits impacting efficiencies and growth.

SOLUTIONS

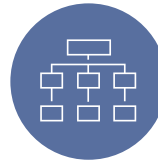
Looking into 2023, we focused on arming their C-Suite with concrete business and sales principles that would increase accountability. We increased standardization and measurements for their teams through:

Operational Maturity Inventory



Consensus on current state

Organizational Accountability Charts



Clear accountability

Initiative Action Lists



Tactical actions and KPIs

FINDINGS

1

Consensus on Current State

The Operational Maturity Inventory revealed gaps in the C-Suite's perspective, specifically around the perceived maturity of internal processes. Leaders reported high maturity in the fundamentals, but were lacking other basic principles.

2

Clear Accountability

By defining accountability and prioritizing initiatives, we uncovered tasks that could be automated without sacrificing execution, allowing the firm an objective view into delivered value while increasing margins.

3

Tactical Actions and KPI's

Leadership had a strong intuition of where they were in their growth journey, but needed proof to support this hunch before involving the rest of the organization. We delivered qualitative and quantitative data to compliment their financial metrics and designed a strategic plan built on the current capacity of the team.