

# Executive Diagnostic Indictment

DOMINANT THEME

Operational Stabilization

[ Service Ops ]

Keywords: followup, calls, scheduling, call, dispatch

MATURITY SCORE

60

Organizational Self-Awareness: 100

Diagnostic Baseline: 100

Workflow Friction: 0

Strategic Alignment: 50

## Executive Summary

Analysis of Cascade Climate Solutions reveals a direct outlook focused on Operational Stabilization. Stakeholder input is dominated by terms like "followup, calls, scheduling", referencing specific bottlenecks in dispatch. Immediate focus must shift to resolving the "followup" constraint to enable sustainable progress.

## Priority Findings

**[HIGH] Critical Bottleneck in Service Ops**

Stakeholder owner explicitly cites "ownership isn't always clear. Estimates get" as a blocker to Operational Stabilization.

**[MED] Unaligned Operational Stabilization Goals**

Desire for calls is contradicted by resource constraints ("to fix scheduling issues, answer questions,").

## Core Tensions

- Tension between mandate for "Operational Stabilization" and reported "followup" reality.
- While calls focuses on followup, owner signals infrastructure gap.

## Implied Risks

- Risk of "Stalled Operational Stabilization" due to unaddressed constraint: "...Get out of daily dispatch and..."
- Operational fragility indicated by reliance on manual "followup" tasks.

# Evidence Appendix

## Constraints

"Stop missing calls and opportunities we're already paying for Get out of daily dispatch and problem-solving Grow revenue without adding more office staff or chaos"

— owner (Source: 50c6fe36-bbec-4577-9aaf-55ae6e0d4162)

"Dispatch and admin are stretched thin, especially during busy days or after hours. I also end up being a bottleneck because decisions come back to me when things aren't clear."

— owner (Source: 50c6fe36-bbec-4577-9aaf-55ae6e0d4162)

"The biggest issue is follow-up. When things get busy, estimates don't always get followed up on quickly or at all. There's also limited visibility into which estimates are still active, which have gone cold, and why jobs are lost."

— sales (Source: 1ac534ff-3216-461e-bfa2-4511de550b47)

## Friction

"Scheduling and follow-up are the biggest slow points. Leads come in, but ownership isn't always clear. Estimates get done but then sit. Same-day jobs are hard to fit in without scrambling."

— owner (Source: 50c6fe36-bbec-4577-9aaf-55ae6e0d4162)

"Deciding which jobs to prioritize, stepping in when scheduling gets messy, handling escalations, and checking whether follow-up actually happened. I shouldn't be involved in that, but I am."

— owner (Source: 50c6fe36-bbec-4577-9aaf-55ae6e0d4162)

"The CRM. Notes and follow-up aren't consistent, and it's not trusted as a source of truth. People rely more on memory, texts, or verbal updates."

— owner (Source: 50c6fe36-bbec-4577-9aaf-55ae6e0d4162)

"Clients don't always get proactive updates, so they call in asking for status. Internally, job details and priorities aren't always clear, which causes confusion in the field."

— owner (Source: 50c6fe36-bbec-4577-9aaf-55ae6e0d4162)

"Call handling, scheduling changes, follow-up on estimates, and customer updates. It feels like we're always reacting instead of running a system."

— owner (Source: 50c6fe36-bbec-4577-9aaf-55ae6e0d4162)