Executive Brief

Executive Summary

Strategic intake captured 4 organizational perspectives across established roles: Business Owner, Ops, Sales Lead, Delivery Lead. No summarization or rephrasing has been applied. Findings below represent raw stakeholder inputs.

Constraint Landscape

Migrated from legacy intake - constraints not captured in structured format

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Operating Reality

Cross-functional handoffs (sales !' ops, ops !' billing, ops !' customer comms)

Waiting on approvals or confirmations that aren't clearly owned

Exceptions management: edge cases trigger a lot of back-and-forth and "who decides" loops

Follow-through after customer conversations (next steps get lost); CRM and task tracking aren't consistently maintained. Email and ad-hoc chats become the source of truth, so we lose history and accountability. We also lack a reliable dashboard for operational status.; Internally: context gets lost during handoffs and escalations; updates live in people's heads.
With clients: we sometimes over-promise or under-communicate because internal status isn't clear in real time.; Exception handling and status clarification. We're constantly stitching together info from different tools and conversations. The manual coordination overhead is too high.

Operations relies on a mix of NetSuite for core financials and inventory, HubSpot for deal context coming from sales, Slack for day-to-day coordination, and spreadsheets for tracking job status, handoffs, and exceptions. Email is still used heavily for approvals and customer updates.

Leads come in through referrals, outbound outreach, website forms, and events. A sales rep makes initial contact, qualifies the lead, and schedules a first call. After that, follow-up varies by rep. There's no consistent next-step framework, and deals often stall unless someone actively pushes them.; Slow or inconsistent follow-up after the first call, unclear ownership for next steps, and lack of visibility into where deals actually stand. Prospects go cold or competitors move faster.

After a contract is signed, details are handed off from sales to operations via email and Slack. Ops assigns the work and coordinates with delivery teams. Execution happens across multiple systems, and updates are shared manually. Projects complete, but visibility throughout the process is limited.; Slack for coordination, email for external communication, and spreadsheets for tracking milestones and

exceptions. There's no single project management system used consistently across teams.