Executive Diagnostic Indictment

DOMINANT THEME

Operational Stabilization

[Logistics Ops]

Keywords: updates, ownership, visibility, sales, status

MATURITY SCORE

60

Organizational Self-Awareness: **100**
Diagnostic Baseline: **100**
Workflow Friction: **0**
Strategic Alignment: **50**

Executive Summary

> Analysis of Northshore Logistics Solutions reveals a direct outlook focused on Operational Stabilization. Stakeholder input is dominated by terms like "updates, ownership, visibility", referencing specific bottlenecks in status. Immediate focus must shift to resolving the "updates" constraint to enable sustainable progress.

Priority Findings

[HIGH] Critical Bottleneck in Logistics Ops
Stakeholder ops explicitly cites "and clarifying ownership when issues arise." as a blocker to Operational Stabilization.

[MED] Unaligned Operational Stabilization Goals
Desire for sales is contradicted by resource constraints ("sales, Slack for day-to-day coordination, and").

Core Tensions

- Tension between mandate for "Operational Stabilization" and reported "updates" reality.
- While ownership focuses on ownership, sales signals infrastructure gap.

Implied Risks

- Risk of "Stalled Operational Stabilization" due to unaddressed constraint: "...lead, and schedules a first call...."
- Operational fragility indicated by reliance on manual "updates" tasks.

Evidence Appendix

Constraints

"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."

<div align="right">— sales (Source: a7e5af97-1112-4379-bc5f-083448b7680d)</div>

"Referrals convert best but are unpredictable. Outbound drives volume but requires heavy follow-up. Website leads are hit-or-miss. Events produce good leads but require fast response to convert."

<div align="right">— sales (Source: a7e5af97-1112-4379-bc5f-083448b7680d)</div>

Friction

"Tracking job status across teams, reconciling information between systems, updating customers, and clarifying ownership when issues arise. A lot of time is spent just confirming what's true before acting."

<div align="right">— ops (Source: 25768b0f-4cfc-4034-a81b-1334f9026b55)</div>

"The data itself is generally accurate in individual systems, but it's not well organized or easily accessible across teams. Leadership doesn't fully trust dashboards unless someone manually validates them."

<div align="right">— ops (Source: 25768b0f-4cfc-4034-a81b-1334f9026b55)</div>

"HubSpot and NetSuite don't sync cleanly. Sales context doesn't reliably carry into operations. Updates often require manual re-entry or Slack clarification. There's no consistent handoff structure."

<div align="right">— ops (Source: 25768b0f-4cfc-4034-a81b-1334f9026b55)</div>

"HubSpot is our primary CRM, but it's not used consistently. Some reps log everything, others only update deals when prompted. Leadership doesn't rely on the data for forecasting."

<div align="right">— sales (Source: a7e5af97-1112-4379-bc5f-083448b7680d)</div>

"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."

<div align="right">— sales (Source: a7e5af97-1112-4379-bc5f-083448b7680d)</div>