

'Leadership Team'

Team

Accomplishments

Between 10/27/2025 and 01/10/2026

Week 52 2025

December 22

@Kent Bonus email to the company

#next

Completed on 12/23/2025 Kent

talk through the importance of this item and balancing opportunities

Completed on 12/23/2025 RobertE

CHECKLIST IN PLACE AND RUNNING TO RECOGNIZE AND WORK PRIORITY OPPORTUNITIES (/ITEMS/203881)

@leenester will provide SOP for how to send and receive wires and ACH (any electronic change) #next

Completed on 12/23/2025 leenester

**Budget Review Needs to Be
Scheduled - we'll resolve this if
Kent/Lee approve next week**

Completed on 12/23/2025 scottilevy

Report on sales hire candidate Matt D thursday #next

Completed on 12/23/2025 kmroesken

SALES HIRE COMPLETED #NEXT
(/ITEMS/204777)

Week 51 2025

December 15

Jeff give update next week on the items we are processing to bring the 14 at risk SLAs back down #next

Completed on 12/21/2025 scottilevy

CLIENT SLAS AT RISK (INBOUND) (/MEASURES/1586/DETAILS)

@scottilevy to discuss with Jeff asset tag process - add this one to seat

Completed on 12/18/2025 scottilevy

@scottilevy and Robert to start the onboarding checklist (sop) for Transactional Business

Completed on 12/17/2025 scottilevy

@Jeffwithmender schedule Ops leader interview with Ashley, team #next

Completed on 12/17/2025

Jeffwithmender

OPS LEADER HIRED (/ITEMS/204775)

Scorecard Entry - Accounting Numbers (Denice? Jeff?)

Completed on 12/17/2025 leenester

Scott to have this updated by next l10

- auto updated from Jeff or Dbox

Completed on 12/17/2025 scottilevy

REVENUE&47;ITEM SOLD (/MEASURES/1592/DETAILS)

We don't take action on this, examine an analytics dashboard in the future

asap

Completed on 12/17/2025 scottilevy

NEW ORDERS SCHEDULED (/MEASURES/1593/DETAILS)

@Jeffwithmender digging into the 4 data errors this week in 1:1, report back on actions taken #next

Completed on 12/17/2025

Jeffwithmender

CLIENT DATA ERRORS (PER SETTLEMENT)
(/MEASURES/1595/DETAILS)

@Jeffwithmender will give a todo to yami and maha to add a list of settlements that cannot be settled into their I10 to report in LT I10 #next

Completed on 12/17/2025

Jeffwithmender

Get with Kris and Robert to establish pricing templates for service fees and commodity pricing...

Completed on 12/17/2025

Jeffwithmender

CUSTOMER CONTRACTS CREATED
(/ITEMS/203979)

update revenue/item sold with Jeff

Completed on 12/17/2025 scottilevy

REVENUE&47;ITEM SOLD
(/MEASURES/1592/DETAILS)

People Issues - 4 weeks, 2 raised per week. SL to discuss the action plan there in the context

Stabilize>Optimize>Scale

Completed on 12/17/2025 scottilevy

Financials Review with Lee

Completed on 12/17/2025 scottilevy

@Jeffwithmender reach out to Stacy to have all inbound load price values sent to You #next

Completed on 12/16/2025

Jeffwithmender

Quick check in - aside from our meeting today with Lee/Kent, are there any lingering budget deliverables that are late.

Completed on 12/16/2025 scottilevy

@brianc to get with Robert, Kent and Dbox to work out an email to send out re: avoiding fraud
Completed on 12/16/2025 brianc

Internal Ticket System for IT #next
Completed on 12/16/2025 brianc

[Robert] Define Client Requirements for ServiceNow Integration #next
Completed on 12/16/2025 RobertE

@Kent will take a pass at bonuses and distribute #next
Completed on 12/15/2025 Kent

Week 50 2025 December 08

[Robert] Distribute Q4 Document to EL team #next
Completed on 12/14/2025 RobertE

Nick frustrations
Completed on 12/10/2025 scottilevy

Process documentation that is Seat Critical - Updates
Completed on 12/10/2025 scottilevy

Project Plan for Operation Enema @Jeffwithmender #next
Completed on 12/10/2025
Jeffwithmender

Process the logistics pipeline to make sure our inbounds are valued correctly @Jeffwithmender so our pipelines (30 day and 90 day come up) #next
Completed on 12/10/2025

Jeffwithmender

BUSINESS DEV 30-DAY OUTLOOK
(/MEASURES/1656/DETAILS)

Scott to whiteboard full process on quoting, client information getting in to our systems (from Dbox issues)
Completed on 12/10/2025 scottilevy

Scott inventory checklist/standards with LT for seats [pushed one week for our 1x1s]
Completed on 12/10/2025 scottilevy

Scott and Robert to review the rock service offering around ai
Completed on 12/10/2025 RobertE
CREATE SERVICE OFFERING AROUND AI DECOMMISSION (/GOALS/9613)

Budgeting process updates from Lee/ updates from all
Completed on 12/10/2025 scottilevy

[Kent] ServiceNow Follow-up with Robert T for OMES #next
Completed on 12/09/2025 Kent

[Kent] Integrate AI initiatives in 2026 Plan #next
Completed on 12/09/2025 Kent

Week 49 2025 December 01

[David] Create plan to improve/replace Gerardo #next
Completed on 12/07/2025 dbox

[Kent] Incorporate Purpose into everyone's playbooks #next
Completed on 12/04/2025 Kent

@leenester get with Kent to update our forecasts #next
Completed on 12/04/2025 leenester

Add this sample to your team's Level**10**

Completed on 12/04/2025 leenester

Set up Measurable to track Product received is lower than desired, we want 75 per week average. peaks and valleys. relative when - what's the KPI

Completed on 12/04/2025 scottilevy

Scott and Dbox to talk through ways to carve this down

Completed on 12/04/2025 dbox

BASELINE QUOTE ACCURACY NUMBERS ESTABLISHED (/ITEMS/204804)

Discuss the new measurables and how we track it for Settlement Errors to agree how we track

Completed on 12/04/2025 scottilevy

CLIENT DATA ERRORS (PER SETTLEMENT) (/MEASURES/1595/DETAILS)

Centralizing communication on next steps with Bloom (quick heads up and discussion)

Completed on 12/04/2025 scottilevy

Is 150 pallets the right target, are we staffing right @Kent

Completed on 12/04/2025 Kent

SORT PALLET BACKLOG (/MEASURES/1588/DETAILS)

@brianc to provide update to Kent after talking with Paratech regarding the wirefraud (from L10 discussion)

Completed on 12/04/2025 brianc

[David] Incorporate Quoting and Value Maximization into process scoping with Scott #next

Completed on 12/04/2025 dbox

BizDev/Inbound Sales KPI final sign off

Completed on 12/03/2025 scottilevy

Staffing remains an issue that Kris is working on - math of the days is tough; we need some whales

@Kent to join or delegate joining
ASCDI and UNEDA, and try again on
global ICT what's app #next
Completed on 12/03/2025 Kent

Discuss with Brian and Kent who is sending our regular electronic transfer email to customers

Identify at least one Inbound Sales Candidate and intro Kris @brianc
Completed on 12/02/2025 brianc

Scott - Review CEO JD and Propose Seat

@brianc to educate scott on how we stop spoofing #next
Completed on 12/02/2025 brianc

**@dbox review scorecard rock with
scott in 1x1**

Scorecard project decide on pipeline approach with Robert, Kris, Kent for Leadership team L10

**@Kent to reach out to ?DMD re:
damage control and relationships
#next**

Week 48 2025

November 24

Pipe Drive: automations broken

Completed on 11/25/2025

Jeffwithmender

Get updated pipe CRM by next week

@kmroesken #next

Completed on 11/25/2025 kmroesken

[Jeff] Create Q4 Rock for PI using considerations in notes below #next

Completed on 11/25/2025

Jeffwithmender

@Jeffwithmender clarify with Dbox the list that this person was on to see if there any issues #next

Completed on 11/25/2025

Jeffwithmender

@Jeffwithmender to check in with Denise on the CBRE asks to verify it's done #next

Completed on 11/25/2025

Jeffwithmender

Update measurable ownership/clarify naming

Completed on 11/25/2025 scottilevy

Scott update the items still unassigned by EOD 11/20

Completed on 11/25/2025 scottilevy

100% OF ASSETS ARE HANDLED PROFITABLY (/GOALS/9586)

Import from Bloom or from Spreadsheet

Completed on 11/25/2025 scottilevy

Scott and team will move all of the Roberts org L10s and issues and todos over

Completed on 11/25/2025 scottilevy

CBRE - GRMS Business Continuity

Management (BCM) Questionnaire

Completed on 11/25/2025 RobertE

**@dbox to call CDR Global contact re:
wire fraud issue for damage control**

#next

**@dbox sending lee finalized forecast
for November BY REVENUE LINE
should include brokerage #next**

Completed on 11/25/2025 dbx

L10s moved

Completed on 11/24/2025 scottilevy

AI Policy/Sign Off Quick Discussion

Completed on 11/24/2025 scottilevy

Scott /RM team import remaining critical cutover data from Bloom

Completed on 11/24/2025 scottilevy

**Scott add to LT 1:1s Source of truth
on financials data**

Completed on 11/24/2025 scottilevy

**Scott to get template over to Robert
to socialize if helpful for CDW**

Completed on 11/24/2025 scottilevy

[REDACTED] BG Update from QP #Next
Sunday, Jan 11/24/2025 10:41

Completed on 11/24/2025 Kent

Week 47 2025

November 17

[Kent] Create Hedgehog for Flywheel

Completed on 11/23/2025 Kent

December project meeting @Kent to produce our forecast and targets

#next

Completed on 11/23/2025 Kent

CDW / US Bank - Budgetary Pricing

Template - @RobertE to get a meeting set up to review this and bring everyone up to speed

Completed on 11/21/2025 RobertE

@RobertE will email his team to connect with Scott #next

Completed on 11/21/2025 RobertE

@RobertE send client profitability to Lee from Power BI #next

Completed on 11/20/2025 RobertE

Monthly Financials review

Completed on 11/20/2025 scottilevy

Juice v. Squeeze on CDW/ Discussion

Completed on 11/20/2025 scottilevy

Bloom to ResultMaps transition...

moving all of our existing meetings over / setup

Completed on 11/20/2025 kmroesken

PLEASE REMOVE

Completed on 11/20/2025

Jeffwithmender

@kmroesken meet with Robert and Kent regarding CDW/US Bank #next

Completed on 11/20/2025 kmroesken

US Bank RFI - questions, concerns,

alignment to core competencies,

resources needed, roles and

responsibilities

Completed on 11/20/2025 kmroesken

Per Kent Focal - Wire issue - how can we prevent it, what process should be

in place

Completed on 11/20/2025 Kent

**scorecard forecasts in the
spreadsheet**

Completed on 11/20/2025 scottilevy

**Discuss where we are per kent as we
move through**

Completed on 11/20/2025 RobertE

**\$700K PROFIT GAP IS CLOSED
(/ITEMS/204002)****what should Kent communicate
regarding the wirefraud**

Completed on 11/20/2025 scottilevy

**Integration Assessment Delivered to
Kent**

Completed on 11/19/2025 scottilevy

Kent onboarded

Completed on 11/18/2025 scottilevy

**Add this sample to your team's Level
10**

Completed on 11/18/2025 Kent

**Learn to navigate to your team's Level
10**

Completed on 11/18/2025 Kent

**@Jeffwithmender to get with Robert,
John and Maha to understand why
pipedrive automations are breaking
#next**

Completed on 11/18/2025

Jeffwithmender

**[Jeff] Follow-up w/ Robert on PO in
Razor and Master Items concerns
#next**

Completed on 11/17/2025

Jeffwithmender

**[Jeff] Create Tracking System for
Maha #next**

Completed on 11/17/2025

Jeffwithmender

Week 46 2025

November 10

@RobertE get team to send Brokerage revenue to Denise per Lee (Dbox has sent his bit) #next
Completed on 11/14/2025 RobertE

need full description - Rec to FG ?
Completed on 11/14/2025 scottilevy
CYCLE TIME: RECEIPT TO FINISHED GOODS (/MEASURES/1583/DETAILS)

RM Quick Demo - Command Center, L10s, 1:1s, Projects
Completed on 11/14/2025 scottilevy

[Jeff] Set meeting with Lee to review transactions for two instances with Justn and Gus #next
Completed on 11/14/2025 Jeffwithmender

[Jeff] Identify at least one Inbound Sales Candidate and intro Kris #next
Completed on 11/14/2025 Jeffwithmender

[Kris] Structure and add Deal Desk Call #next
Completed on 11/14/2025 kmroesken

I have about 1/2 of the metrics completed in charts, I need to complete the balance.
Completed on 11/14/2025 dbox

Automation emails that are to be going to product sales are not working. We will need to review why they stopped and correct.
Completed on 11/13/2025 Jeffwithmender

Add this sample to your team's Level 10
Completed on 11/13/2025 kmroesken

@brianc N8N Integration with ServiceNow - discuss with Scott

Brian onboarded
Completed on 11/11/2025 scottilevy

[Robert] Intro Chris Rey to Kris Retry

Completed on 11/10/2025
resultmaps_success_team

[Robert] Robert has been reviewing impacts on client performance that he will share with Lee and DBox

Completed on 11/10/2025
resultmaps_success_team

[Robert] Robert and Kris to fill the seats for both events. Due to Kent by 10-31

[Robert] DBox & Robert to provide list to Denice of brokerage deals. We need to go back to 2024
Completed on 11/10/2025
resultmaps success team

[Lee] Send Financial Package to Kuefler for QP3
Completed on 11/10/2025
resultmaps_success_team

[Kris] Robert and Kris to fill the seats for both events. Due to Kent by 10-31
Completed on 11/10/2025 kmroesken

[Kent] Build Q4 Threshold Rock
Completed on 11/10/2025
resultmaps_success_team

[Kent] Create Q4 Rock – Outline/Threshold

[Kent] International Program Progress

- build out a rock

Completed on 11/10/2025

resultmaps_success_team

[Jeff] Jeff to set training meeting with Stacy/Yami/DBox Friday 10-31

Completed on 11/10/2025

resultmaps_success_team

[David] Identify at least one Inbound Sales Candidate and intro Kris

Completed on 11/10/2025

resultmaps_success_team

[David] David to bring next rock requirements to QP4

Completed on 11/10/2025

resultmaps_success_team

[David] DBox & Robert to provide list to Denice of brokerage deals. We need to go back to 2024

Completed on 11/10/2025 dbox

Week 01 2025

December 29

Scott and Brian to talk through Razor contracts whats our work around

Completed on 01/02/2026 scottilevy

Get update from the team on how/who when to train on Razor contracts

Completed on 01/02/2026 scottilevy

COMPLETE TRAINING FOR 100% OF
AFFECTED TEAM MEMBERS
(/ITEMS/203892)

[Robert] Evaluate Deal/Contract Calculator as Q4 Rock with Pipedrive functionality to follow #next

Completed on 12/31/2025 RobertE

@dbox connect with Denice ;Amazon numbers look high, was acquisition cost not taken - need to find out #next

Completed on 12/30/2025 dbox

to update product sales outbound onboarding process to ensure we log where to send invoices per our fraud discussion #next

Completed on 12/30/2025 dbox