

FROM ONE TO MANY

Framework that helped strengthen a company

CASE STUDY

Client: Copier Dealership,
Omaha, NE

Size: ~< 100

Before:

- Services Director had no reporting tools or support structure
- No workflow documentation or process alignment
- IT division had no scalable proposal system
- No pricing strategy, tracking, or reporting tools

Lex & Line Engagement:

- Created handbook, reports, and workflow systems for Services
- Designed scalable proposal structure for Network Solutions Group
- Implemented naming conventions and document frameworks
- Built project and contract tracking system from the ground up

After:

- Full operational visibility for Service leadership
- Higher technician performance and retention
- IT division gained a repeatable, measurable proposal system
- Foundation laid for long-term growth — and a career in tech

This one is personal.

This is where I found my groove — and the first step that led me toward Lex & Line. I was in the middle of a divorce and needed a job that gave me flexibility and a paycheck that could feed my kids. Simple as that.

What they gave me instead was lifelong gratitude — and a step into the world of technology.

When I stepped into the company — a copier dealership in Omaha, NE — my job was to build something that didn't exist: structure.

The Services Director had been trying to manage a team of more than 30 technicians by memory, instinct, and sheer persistence. There were no reporting tools. No workflow processes. No visibility into technician performance. And no one asking what needed to change — until one day, he said, "ENOUGH."

What started as a simple administrative support role became the foundation for a full system overhaul.

I built a handbook to define the role. I mapped reporting procedures and created templates for daily, weekly, and monthly summaries. I developed operational processes aligned with both the Director's needs and the company's long-term growth. And slowly, visibility returned — into profitability, technician performance, training gaps, and operational health.

The impact? Clarity. Accountability. Retention.

The proof? Many of those technicians are still there — decades later.

But that wasn't the end of the story.

Because of that early success, I was pulled into the company's IT division. I was originally brought in to build out the admin function — but as I explored their systems, I saw a deeper problem. And a deeper connection.

The proposal structure was rigid and outdated. There were no pricing frameworks. No naming conventions. No project tracking. No way to see costs, margins, or contract performance.

Everything that should have been trackable — wasn't.

So I built what I knew they needed.

I designed a scalable, repeatable proposal system. I introduced naming conventions and file hierarchy. I built a project tracking framework to monitor hours, costs, ROI, and contract results. And I created a process that finally tied project work to business outcomes. It was my first step into technology — and I never looked back.

But this isn't about me. It's about what the company gained.

They evolved. They became stronger, more agile. They could finally see where they were succeeding — and where they needed to work a little harder. ROI increased. Directors

could report on performance with clarity. Leadership could finally lead with insight. What started as a single support role became a systems foundation that reshaped how the company operated.

One small step. Giant results.

