

# WHEN WORKING HARD ISN'T ENOUGH

*And Then Things Just Fall into Place*

## CASE STUDY

**Client:** Regional IT Integrator, Vancouver, WA

**Size:** ~200 Employees

### *Before:*

- Disconnected proposal processes
- No centralized documentation
- Limited visibility across departments

### *Lex & Line Engagement:*

- Structural repository design
- Proposal and pricing framework
- Cross-functional communication systems

### *After:*

- 40% increase in win rate
- Unified team workflows
- Reduced internal friction and

You know that moment of clarity — when things just fall, seemingly of their own accord, perfectly into place? That never happens. There is always a structure or process that, with just a little bump, turns chaos into order.

For a small IT company in Vancouver, they didn't realize how much chaos they lived with day to day — until it disappeared.

There was no collapse. No single failure to point to. Work kept moving. Projects were delivered. Sales kept happening. But underneath it all, the weight was building — scattered files, siloed proposals, inconsistent pricing, and no shared system to hold any of it together.

Each member of the sales team had their own way of working. Their own templates. Their own file names. Their own drives. It was functional, but fragile — an invisible patchwork held together by memory, improvisation, and a steady dose of pressure.

Leadership began asking questions. What's our win rate? Which proposals are profitable? Where are the bottlenecks? And for all the effort the team was putting in, the answers were there — in hundreds of fragments. Not clearly. Not consistently.

Imagine your company with no core vision, no unified marketing structure, no single voice. No folder structures. Nothing.

How do your customers know who you are? What you stand for?

How do your employees know which file to use — or which logo is the current one?

When we were brought in, we didn't start with a system. We started with one department. One department that desperately needed help. They needed a framework they could build on.

So we listened. We learned. We developed. We designed. And we built.

The team was given tools to learn, goals to meet, a structured folder system, and a rhythm of daily reporting. And from there, it grew — little by little. Other departments began asking for help. We followed the pattern.

We listened for what lived underneath the pain points — the tension between flexibility and control, the stress of knowing that success depended on personal recall instead of shared infrastructure.

They didn't need stricter rules. They needed relief. And what they were asking for — even if they couldn't name it — was a framework that made space for both structure and trust. We built that framework with them, one piece at a time.

A shared repository where documents lived — not just got stored. Templates that worked across departments, easing the load for accounting, project leads, and sales alike. A pricing model that didn't erase autonomy, but clarified the range. And a rhythm of communication that replaced the urgent ping of "Did you get this?" with the quiet confidence that yes — it was already there.

The shift wasn't loud. There was no sweeping transformation. What emerged instead was quiet alignment — between departments, between expectations, between people who no longer had to carry it all on their own.

Proposals came together faster. Margins became clearer. Wins increased. But more importantly, the team stopped working *against* the system — and started moving *within* it.

This wasn't just about efficiency. It was about giving the client a structure that could scale without losing the heart of how they worked.

And sometimes, that's how things just simply fall into place — changing everything.

