

A SOLO ACT, SCALED

The system that lets one scale without chaos

CASE STUDY

Client: Solo Entrepreneur,
Texas

Size: ~One

Before:

- Solo founder managing all proposal work manually
- No templates, trackers, or structured folder system
- Inefficient RFP response process with high stress

Lex & Line Engagement:

- Built proposal system in Microsoft Teams
- Created project dashboard, naming conventions, and color-coded tracker
- Developed centralized document library + reusable templates

After:

- Reduced response time and workflow friction
- Enabled confident entry into government contracts
- Created a sustainable, scalable foundation for growth

She wasn't new to technology. She had more than twenty years under her belt as a Solution Architect. But this is where so many technical people struggle: not with the work itself — but with **how to pull it all together**. Alone.

As a solo IT entrepreneur in Texas, she wore every hat: sales, delivery, billing, and strategy. Her skills weren't the issue — the lack of process and structure was. She wanted to grow into state and local government contracts, but without a framework, every opportunity felt overwhelming.

There were no templates. No process. No central place to store files. She tracked everything in memory, in email, or in a folder structure that shifted every few weeks. She responded to RFPs, but each one took longer than it should — and she never quite knew if she was doing it right. The stress of trying to scale while holding everything together by instinct was becoming unsustainable.

When we met, she didn't ask for shortcuts. She asked for support.

We built her a system that respected how she worked — and gave her the structure to work smarter. A dedicated Microsoft Teams workspace became her base. From there, we developed a fully functioning framework she could draw from confidently. She could finally see where she was doing well — and where to focus her time.

Channel Development included

A **Centralized Document Library**, structured around real-life needs:

- **Marketing assets** — logos, collateral, brand materials
- **Resources** — key files pulled from scattered folders
- **Templates** — designed in her color scheme and voice
- **Master Files** — organized by response type
- **Proposal Pieces** — org charts, timelines, forms
- **Certifications** — MBE, WBE, AAPV, and others
- **Resumes** — for contractors she used regularly

A **Proposal Dashboard** showed every opportunity at a glance.

We introduced **clear naming conventions** to help her find what she needed, fast.

Every part of this system reflected her voice, her services, and her goals.

She didn't just get folders. She got rhythm. It made sense — and it was easy for her to use.

Everything she needed lived in one place. No more hunting. No more guessing. No more rewriting the same paragraph for the fifth time. Every future RFP now had a *starting point* — and a *finish line*.

It didn't make the work easy. But it made it possible.

And for a company of one, that's everything.

