## **CASE STUDY**

He held everything in his head — the files, the deadlines, the details, the strategy.

What makes this story even more striking is that this was a mid-sized integrator with seven siloed divisions. And yet, the work of managing, tracking, and building RFP responses worth millions of dollars in revenue all fell on one person.

We're not talking about a small IT provider. Most of us have been there — but not to this depth. From the outside, everything looked fine. Not great, but fine. But once you looked inside each isolated division, the stress became crystal clear.

No one talked to one another. No one shared information. No one knew what the other divisions did. No one realized that if they worked together, they could be so much more. Every division was reinventing the wheel — every single day.

But I digress. Back to our story.

He was one of the original team that built the company. He knew what needed to happen. He always figured it out. But there was no room to rest, no room to scale, and no system to support what was already working — barely.

There wasn't chaos. But there wasn't calm either.

Each opportunity was a fresh start. Each response, a scramble.

No historical tracking. No naming conventions. No shared access to critical documents. He wasn't trying to work in the dark — he just didn't know where the light switch was.

When we entered the picture, it wasn't about creating something new. It was about building a structure that could carry the weight he'd been holding for years.

We always start at the same place: we listen, we discover, and we ask questions.

Where does this information live? Who has access? Do you have a template? Where are your marketing materials? Who creates your imagery? What happens after submission? How is anything tracked?

Once we understood the challenges, we began to build.

We created a centralized repository that could grow with the division.

We developed naming conventions that worked for *his* brain, not just the file system. We built a project tracking workbook showing status, ownership, and volume at a glance. We designed reusable templates that worked across contracts, not just for one. We introduced a weekly meeting so divisions could start talking — about work and working together.

We color-coded, categorized, and mapped everything — until it stopped living in his head and started living in the system.

But that's not where the story ends.

As the division found its rhythm, other teams began to notice. First they asked for pieces. Then frameworks. Then full system buildouts. What started as a single-man support structure became a cross-divisional framework — quietly, steadily transforming how the entire company approached proposal work.

Lex & Line

Today, that one man doesn't work alone. He has a team and a business behind him that collaborates. He works inside a framework that supports him, reflects him, and evolves with the company he helped build.

Sometimes a quiet transformation reshapes everything.

**Client:** Mid-Size Multi Division IT Solution Provider

Size: ~450 Employees

#### Before:

- One-person proposal team managing millions in RFPs
- No shared repository or document access
- Siloed divisions with no crosscommunication
- No naming conventions, templates, or historical tracking

# Lex & Line Engagement:

- Built proposal system in Microsoft Teams
- Created intuitive naming conventions + project tracker
- Designed centralized document repository + shared templates
- Introduced weekly crossdivisional collaboration rhythm

#### After:

- Reduced proposal development time
- 3+ divisions adopted the framework
- Workload transitioned from individual to team-supported
- Enterprise-wide shift toward repeatable, scalable structure

### Testimonial:

I don't know how we did anything before you.