

Case Study — Scaling a 40-Year-Old Business (For-Profit)

From chaos to cadence: material growth, happier teams, and a GTM engine that sticks



Client type: 140+ FTE, family-owned business

Context: A visionary founder with many concurrent ideas, flat performance, and ad-hoc execution created frequent priority collisions and inconsistent follow-through.

Hired to translate strategy into disciplined operations—budgets, KPIs/scorecards, cadence, and culture—while owning day-to-day performance and P&L.

Before:

- No consistent operating rhythm; shifting priorities and unclear ownership
- Limited KPI/scorecard discipline; slow close; rising past-due A/R
- Customer experience split across teams; overtime and rework at the dock
- Safety, hiring, and retention challenges; uneven compensation structure
- Flat growth over multi-year period squeezing profitability

Artifacts delivered:

Operating Model • OKRs • BI dashboards & reporting cadence • CX org & service playbooks • Budget & COGS model • Discretionary-spend guardrails • A/R policy suite • Order cut-off & close calendar • SS-CMMS + capex Gantt • Safety program • Comp bands & check-ins • Sales playbook & commission plan • ICP & customer journey defined • SDR plan implemented • marketing automation and MQL implementation

What we did: Strategy => Execution:

- Installed weekly staff + manager 1:1s, OKRs, and bi-annual start-stop-continue
- Built a BI team; created an automated reporting habit; prepped for ERP
- Unified service functions into a single Customer Experience org with “customer-first” norms

What we did: Financial discipline & controls:

- Built a \$10M budget framework and an industry-first COGS model; discretionary-spend guardrails (–\$100k in one year)
- Revamped A/R: stronger credit apps, empowered A/R clerk, smarter terms led to past-due A/R reduced to a manageable level
- Introduced a commission plan tied to both revenue growth and CSAT

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What we did: Marketing & Growth (GTM):

- Defined ICPs for five core segments and mapped customer journeys (value props, objections, channels).
- Implemented marketing automation with nurture sequences + basic lead scoring; created an MQL definition and a same-day MQL to Sales handoff SLA.
- Built a predictable revenue motion and sales playbook (SDR / AE / Business Development), including talk tracks and objection handling.
- Launched a new retail channel (profitable within three years) and a landscaper pickup program (now ~5% of revenue).
- Hired SDRs for cold outreach; built talk tracks, activity targets, and quality gates for handoffs.
- Recast sellers as Account Managers focused on growing their book of business with growth-based incentives.

What we did: Operations & supply chain:

- Order cut-off times led to faster turns, fewer last-minute changes; dock overtime reduced by ~85%
- “White-glove” process for high-margin custom orders (quality up, cost down)
- Implemented SS-CMMS software for maintenance; Gantt for capex (e.g., \$725k expansion) and project tracking

What we did: People, safety & culture:

- Company-wide comp bands, annual market surveys, values-based check-ins led to Employee retention increase of ~33% over three years
- Four-day work week (for off-peak months) led to morale/productivity boost
- Safety program: workers’ comp experience mod 1.75 => 0.93 (three-year run < 1.0)
- Seasonal department reviews with CEO; weekly COO update to align priorities

Outcomes:

- Growth: 150% top line over 3 years
- Customer experience: CSAT ↑ ~20%; unified response
- Cost & cash: Dock OT ↓ ~85%; past-due A/R reduced to a manageable level
- Engines: Retail channel profitable within three years
- People: Retention ↑ ~33%; safety mod ↓ to 0.93; culture measurably steadier
- Marketing: industry first Marketing Qualified Leads to the sales team
- Run cadence: From idea overload to a focused operating rhythm with visible priorities and accountable delivery

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