

Where you are

Bayou Bend is a Regional 3PL Logistics business in Houston, 14 years in, running at \$22.0M with 110 people. Revenue has continued to grow, but not without strain. The owner described the central problem as: Two things at once. The economics of our largest customer segment are deteriorating, and we don't have alignment on whether to defend it or walk away. PE wants a clean answer in 90 days.

28% / 55%

CUSTOMER CONCENTRATION ·
MATERIAL

18% · -4.0 pts

GROSS MARGIN · 3-YR TREND

18%

GROSS MARGIN, CURRENT
YEAR

What we'd recommend

Two paths fit equally well based on what we heard. The next step is to choose between them.

Two of the three engagement types scored close to each other in the rubric. Rather than guess, the next step is a 45-minute working session to choose the entry point, with a one-page comparison in hand.

What we see

01 The signal from the call points in more than one direction. A deeper read is the right next step before recommending a path.

02 Two services scored within one point of each other. The next call is to choose the entry point, not to widen scope.

03 The diagnostic data needed to call the path is partially out of view from the Snapshot. A two-week paid Diagnose phase brings it into view.

What it costs and delivers

01 · 45-minute working session with both engagement types side-by-side.

02 · One-page comparison delivered in advance of the session.

03 · Decision and start date set inside the session.

Both ranges shown above · Choose at the session

Reply to book the 45-minute session. Two times offered in the email.

— HYPOTHETICAL SCENARIO · FOR ILLUSTRATION ONLY