

Where you are

Caldwell is a Industrial Services business in Greater Houston, 22 years in, running at \$8.5M with 42 people. Revenue has been flat for the better part of two years. The owner described the central problem as: I have three different VPs each pulling the company in a different direction. We hit one good year, slacked off planning, now nobody agrees on what comes next.

18% / 41%

CUSTOMER CONCENTRATION ·
ELEVATED

34% · -2.0 pts

GROSS MARGIN · 3-YR TREND

55%

OWNER DEPENDENCY

What we'd recommend

Strategic Plan. 30 days. The output is the choice you have been avoiding making.

We are recommending the Strategic Plan because the rubric flagged 7 of 7 signals that the bottleneck is clarity, not capability. Caldwell has the team, the customers, and the runway. What is missing is a defined where-to-play and how-to-win, ratified by leadership and translated into the next twelve months of decisions. That is the work.

What we see

01 The business has more than one credible direction and no agreed choice. The team is working hard against goals that no longer match the resource decisions being made.

02 Goals exist on paper. The hires made and the spend committed in the last twelve months do not match those goals. That is a planning gap, not an execution gap.

03 Leadership is aligned on the outcome and split on how to get there. That split is showing up in pricing, hiring, and which customers get the team's time.

What it costs and delivers

01 · Diagnose phase: structured listening, financial review, central-challenge statement.

02 · Decide: three options scored against constraints. Recommended direction, ratified.

03 · Design + Deploy: 12-month roadmap, KPI dashboard, weekly cadence, 30 days implementation support.

\$18,000–\$45,000 · 30-day delivery

First 100 program · \$0 upfront · Pay when satisfied

Next step: a 30-minute follow-up to confirm scope, names, and start date. Reply to this email or book directly.

— HYPOTHETICAL SCENARIO · FOR ILLUSTRATION ONLY