

ARCHITECTURAL METALS & BUILDING PRODUCTS • FIVE BRANDS

Apogee Architectural Metals

Phase 1 Diagnostic • Phase 2 Transformation

“We knew we had opportunities to improve our commercial operating system, but we needed a clearer picture of where we were, where we needed to go, and how to get there. Inselligence helped us define that path. It was impressive how quickly they were able to use their own technology against our data to drive critical insights, but more importantly they were able to help us understand the operating systems needed across people, process, and technology to turn those insights into repeatable actions to drive results. Their work has helped us move forward with greater confidence and speed as we continue on our transformation journey to build world class commercial excellence!”

Troy Johnson

PRESIDENT, APOGEE ARCHITECTURAL METALS

THE STARTING POINT

Every commercial organization sits somewhere on a continuum

Apogee builds to a standard. Its operations run on engineered processes, measured tolerances and documented method. Its commercial engine had grown a different way, organically, across five brands and three genuinely different sales motions, on a CRM that had been configured for one of them.

That is not a failure. It is where most industrial businesses are, because nobody ever sat down and engineered the commercial side the way they engineered the plant. The question was not what was broken. The question was what a designed commercial engine would look like for this business, and what it would take to get there.

THE ENGAGEMENT

Fourteen weeks, two phases

PHASE 1 • TWO WEEKS

The Diagnostic

Structured interviews with the people who run the commercial operation across every brand and region, set against a quantitative read of the CRM data. The data established what was happening. The interviews explained why. Five findings, each one quantified in revenue.

PHASE 2 • TWELVE WEEKS

The Transformation

The architecture designed and documented: a master lead to cash revenue flow, a process map for each of the five brands built around how each actually sells, the operating playbook, a technology recommendation grounded in the process, and a sequenced twelve month roadmap.

“I can’t tell you how much I appreciate your approach to showing us the way. Your candor and transparency are not seen from consulting groups very often.”

JEFFREY H APPEL • DIRECTOR OF SALES, APOGEE ARCHITECTURAL METALS

WHAT WAS ENGINEERED

- The master revenue flow, lead to cash, end to end, with the stages defined by what must be true to advance rather than by where a deal happens to sit.
- Five brand specific process maps, each mapped to its real motion rather than forced through one template.
- A Revenue Operations Playbook, the institutional knowledge that lived in people's heads, written down and maintained.
- A technology stack recommendation sequenced so nothing gets deployed before the architecture that governs it.
- Twelve commercial capabilities scored against a defined standard, and a twelve month roadmap of ten workstreams with named owners and a measurable first ninety days.

HOW IT WAS DONE

Technology enabled, not technology led. The deterministic platform connected to the existing CRM and produced the quantitative baseline in days rather than weeks: penetration by brand, deal load against capacity, where flow was being lost. Every finding traced to the company's own data, which is what made the findings difficult to argue with and easy to act on.

Led by practitioners who have run the function. Not a partner fronting a junior pod. The people in the room had built and operated commercial systems at scale, which is why the recommendations were executable rather than theoretical, and why the sessions moved at the pace of people who had seen the problem before.

Architecture before automation. *The operating model was designed first. The technology recommendation followed from it, sequenced deliberately. That order is the whole method: software deployed onto a commercial process that was never engineered will scale the problem, not solve it.*

WHERE THE BUSINESS IS NOW

A design, a roadmap, and a defined standard for good

Apogee finished the practitioner phases with something it did not have fourteen weeks earlier: a documented picture of its current state built from its own data, an engineered design for the commercial engine it wants, and a sequenced roadmap for getting there. Ten workstreams, named owners, and a measurable first ninety days.

Twelve commercial capabilities are now scored against a defined standard, so progress is measured rather than asserted. The forecast has a method behind it. And the leadership team shares one definition of what good looks like, which is the precondition for every improvement that follows.

WHY IT TRANSFERS

The method is for companies doing well that sense there is more

Apogee is not a company in crisis. It is a business that has performed for years, with a leadership team now focused on maximizing what it is capable of. Its commercial side had simply never been engineered to the standard its plants are held to, which describes most industrial and construction businesses of scale.

The signal is not that something is failing. It is the sense that the organization is producing less than it should, and that nobody can say precisely where the difference is going.

The method meets a business wherever it sits on that continuum. It establishes current state from the company's own data rather than from opinion, designs the future state as an engineered system, and sequences the path between them. What the client gets is not a report. It is a commercial engine specified the way an operations leader would specify a production line: defined stages, explicit criteria, measured throughput, and a standard that makes the output repeatable.

Consistent, repeatable revenue is a design outcome. It is produced the same way every other reliable output in an industrial business is produced, by engineering the system that makes it.

Where this sits in the engagement. The Diagnostic and the Transformation are the practitioner phases, the architecture and the design. Apogee has now moved into execution, implementing the roadmap.