



MARGIN MAX

CASE STUDY PORTFOLIO

Three engagements. Three transformations.

Real Margin Max work — anonymized. Three founder-led operators, three operating systems installed, three measurable changes in how the business runs.

OPERATIONAL OUTCOMES • HELD IN CONFIDENCE

Same architecture. Different starting points.

Each engagement begins with a diagnostic, installs the focused set of command centers the operation needs inside the tools the team already uses, and ends with the team running the system without us.

The three studies that follow show that pattern across the three problems founders hit most: an operation that lives in the owner's head, a business with no weekly visibility, and approved revenue quietly slipping away.

\$372,865

Supplement revenue captured

\$1.5M+

Aged AR recovered in 90 days

355

Jobs cleared · 135-job backlog retired

Clients, names, and account-level values are anonymized and held in confidence. Figures shown are actual engagement outcomes.

Margin Discipline

CS 01 · CRM & WORKFLOW

CLIENT PROFILE · \$5M-\$10M RESIDENTIAL EXTERIORS OPERATOR

INITIAL CONDITION

The operation ran on the owner's memory. Jobs moved through an undefined path, a cleanup backlog had accumulated, and leadership rebuilt the board by hand every Monday to know where things stood.

SYSTEM INSTALLED

- Rebuilt CRM pipeline board — every job on one visible, accountable path
- Sales-to-Closeout workflow across all phases, with required-field discipline
- Stage accountability and ownership so the board carries the workflow, not the owner

METRICS IMPROVED

355

Jobs cleared

135

Job cleanup backlog retired

4 hrs

Weekly leadership hours recovered

OUTCOME

Once the live board carried the workflow, the Monday rebuild disappeared. The operation stopped depending on the owner to know where every job stood.

Margin Visibility

CS 02 • EXECUTIVE VISIBILITY

CLIENT PROFILE • GROWTH-STAGE CONTRACTOR • SIX-REP SALES FLOOR

INITIAL CONDITION

A growing sales floor with no weekly visibility. Leadership couldn't see performance until it was too late to act, and reps weren't accountable to a shared scoreboard.

SYSTEM INSTALLED

- Live weekly executive dashboard — the numbers leadership reads every week
- Rep ranking and lead scoring to make performance visible and comparable
- System Health Monitor — automated integrity checks before leadership reads the numbers

METRICS IMPROVED

Weekly

Live executive dashboard cadence

98 / 98

Reporting integrity checks PASS

Per rep

Ranking & lead scoring installed

OUTCOME

Leadership now sees the operation weekly, on numbers that reconcile before anyone reads them — and the sales floor is accountable to a scoreboard, not to the owner's memory.

Margin Recovered

CS 03 · CASH & FINANCIAL CONTROL

CLIENT PROFILE · SCALING CLAIMS-FUNDED CONTRACTOR

INITIAL CONDITION

Approved revenue was at risk of going unrecognized, receivables were aging, and claims and supplementing weren't tracked to a single financial control surface.

SYSTEM INSTALLED

- Claims & Supplementing financial control system — one surface for tracked revenue
- Job-level reconciliation and Commission Payment Request control (revenue, cost, margin)
- Restructured AR process with salesperson-level accountability and direct collections oversight

METRICS IMPROVED

\$372,865

Supplement revenue captured · 98 claims · 5 months

\$1.5M+

Aged AR recovered inside 90 days

\$38,989.51

Reconciled to a single control surface

OUTCOME

Approved revenue at risk of being unrecognized was recovered, and cash trapped in aged receivables came back to work — inside a single, reconciled financial control surface.

THE NUMBERS

What the systems produce.

Across the portfolio, the installed operating systems produced measurable, verified outcomes.

\$372K

SUPPLEMENT REVENUE
CAPTURED

Approved revenue at risk of being unrecognized — recovered inside five months across 98 tracked claims.

\$1.5M+

AGED AR RECOVERED

Restructured AR, salesperson-level accountability, and direct collections oversight inside 90 days.

4 hrs

WEEKLY LEADERSHIP TIME

Reclaimed weekly leadership prep — once the live board carries the workflow, the Monday rebuild disappears.

Anonymized clients. Verified figures. Account-level values held in confidence.



YOUR TURN

What would your operating system score?

Score your operating infrastructure 0–100 across six working systems. 30 questions. 5 minutes. 1 score — and a clear read on where margin is leaking.

Take the Diagnostic →

marginmaxllc.com/diagnostic

MARGIN MAX LLC • JEREMY@MARGINMAXLLC.COM • (316) 751-6626