

Interview — Managing Partner

Meridian Advisory Group · 2 September 2026 · 48 minutes · Recorded with consent

Consultant: Walk me through how an engagement gets shaped today.

Every engagement is custom because every client is different. That is the value we add. A client calls with a problem that looks like three problems, we spend a week finding out which one it actually is, and then we scope the work. I would not want to sell something off a shelf.

Consultant: What does a diagnostic cost the firm to deliver?

The honest problem is that I cannot tell you what a diagnostic costs us to deliver — it depends who does it. If one of my two strongest partners runs it, we are done in three weeks and the client signs the follow-on work. If it goes elsewhere it can run six or seven weeks and I end up in the room anyway.

Consultant: How consistent is the output?

Two of my partners produce work I would put in front of anybody; the rest is uneven. That is not a talent problem. They are good people. There is nothing written down for them to follow, so they are inventing the method every time.

Consultant: You have discussed packaging before.

We have talked about productizing for three years and nothing shipped because the people who would build it are the same people who are billing. Every January it goes on the plan. Every March somebody's client has a crisis.

Consultant: What would success look like twelve months out?

A named offer I can put a price on, that a manager can run, that pays us every month instead of every project. If we get there I stop being the constraint on the firm.

Sample document — Meridian Advisory Group is an illustrative firm created for this demonstration. Nothing here refers to a real client.