

Interview — Practice Leader, Operations

Meridian Advisory Group · 2 September 2026 · 37 minutes · Recorded with consent

Consultant: What do clients actually ask you for?

Clients ask us for the same five things in a different order. If we had a standard assessment with a standard output we could run it in two weeks instead of six. Margin assessment, footprint, planning discipline, supplier concentration, and whether their leadership team can execute. That is the list. It has been the list for years.

Consultant: How is the firm using AI today?

I use AI tools myself for first drafts but there is no firm position on it, so nobody documents what they used and nothing gets reused. I am not going to put that in a status report until somebody tells me it is allowed.

Consultant: What rework do you see?

Our best analyst rebuilt the same benchmarking model four times this year. Same logic, four different clients, four builds, because nobody owns the asset and nobody knows where the last one went.

Consultant: What is the constraint on selling more?

Not demand. The constraint is that we cannot describe what we sell in a sentence with a price on it, so every conversation starts from a blank page and a partner's calendar.

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