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LIDD INSIDER

News & Insights for Supply
Chain Leaders

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Business Insights

The Value of Owner's Representation in Project Delivery

In this edition, we explore how supply chain leaders can stay ahead when growth or disruption demands decisive action. Acting as an Owner's Representative (Owner's Rep) or stepping in as an interim executive isn't just a consulting service, it's a way to bridge strategy and execution when the game is on the line. From stabilizing operations to charting a clear roadmap, this approach brings experienced leadership that can move quickly, make critical calls, and deliver measurable results while a company recruits or restructures for the long term.

We also examine why a dedicated subject-matter expert is the strongest safeguard for any major project, whether it's a facility build or a complex system rollout. With vendors, integrators, and internal teams each pushing their own priorities, a single point of accountability keeps every stakeholder honest, enforces milestones, and protects your investment from costly missteps. Together, these perspectives show how disciplined oversight and execution-ready leadership can turn high-pressure moments into opportunities for lasting operational strength.

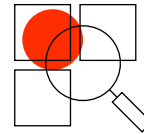


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Success Story

Beyond Advice, Built on Trust: How LIDD can help you lead when the game is on the line

Thought Leadership

From the Trenches: Why Your Project's Best Defense Is a Subject Matter Expert

Beyond Advice, Built on Trust

How LIDD can help you lead



Author: Vivi Tran Lynch, Managing Director

At LIDD, clients bring us in for our supply chain expertise — we analyze challenges, identify opportunities, and recommend solutions. But sometimes, a recommendation alone isn't what the client needs. In high-pressure moments of transition or transformation, our clients don't just want someone to draw up a play. They need someone to get on the field and run it — with speed, precision, and confidence. That's when LIDD becomes a uniquely valuable partner — a role we call the **“Owner's Rep.”**

It's a position we've played many times, taking on direct responsibility to drive a specific workstream — a technology selection, a distribution center launch, an operational transformation — acting as a core, decision-making extension of the client's leadership team.

The Trap of “We've Always Been Fine”

In some cases, our mandate also goes deeper: leading from within as a fractional or interim executive. We've seen rising demand for this model that provides a clear bridge from strategy to execution. High-transition companies are looking for not only a partner to support a system rollout, but an experienced executive who can lead people, refine processes, and drive results across the board. That means owning decisions, managing teams, and making changes on the ground — all while keeping one eye on long-term strategy and the other on today's fulfillment plan.

It's not a typical consulting engagement and we're not typical consultants (that's the point!)

Why bring in an interim leader instead of making a direct hire?

When you should consider interim leadership:

An interim Head of Operations makes sense when a company is in transition, facing urgent operational challenges, or needs experienced leadership that can both set direction and immediately drive execution — often delivering impact from day one.

In these moments, speed, clarity, and execution matter more than another deck of strategic recommendations. A consulting partner who can take to the field and drive plays — not just design them — can be a game-changing resource.

Here's how to know when it's time:

1. There's a leadership gap

A key executive has left (or was never in place), and someone needs to step in before execution stalls. Or, there's a major strategic operational change on the horizon which the existing role isn't designed to address. You might be weighing the type of resource you need: vision at the top vs execution on the ground.

2. Post-M&A or divestiture

The business has significantly changed, and the operational infrastructure hasn't caught up. You might be thinking about how to consolidate networks or implement an ERP or WMS.

3. Technology transitions

New systems require an experienced leader to drive business requirements and process change while keeping day-to-day operations smooth.

4. Scale stress

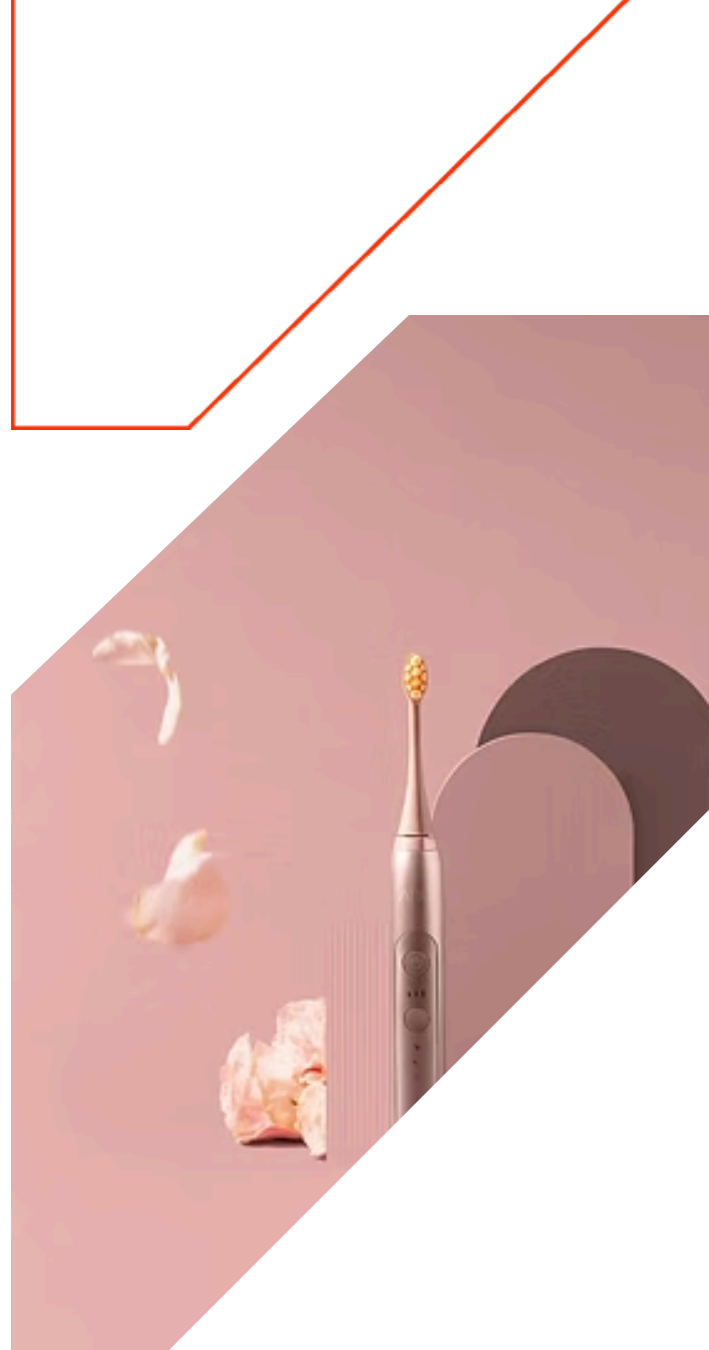
Growth has outpaced execution and the operation needs structure — fast — without losing momentum.

Is Your Business Ready for Logistics Automation?

Don't risk making costly mistakes or investing without a clear plan — let LIDD's assessment tool guide you towards a successful implementation.



Assess. Identify. Act



How It Works (and Why It Works)

Acting as an interim Head of Operations requires a unique skillset: authority without ego, leadership without disruption, and a broad playbook. Unlike a direct hire who may need time to acclimate, we adapt immediately, tailoring our approach to the organization's goals and game plan. We blend in, build trust, and drive results from within — stepping into the huddle, reading the play, and executing fast, all while setting up the next leader for success.

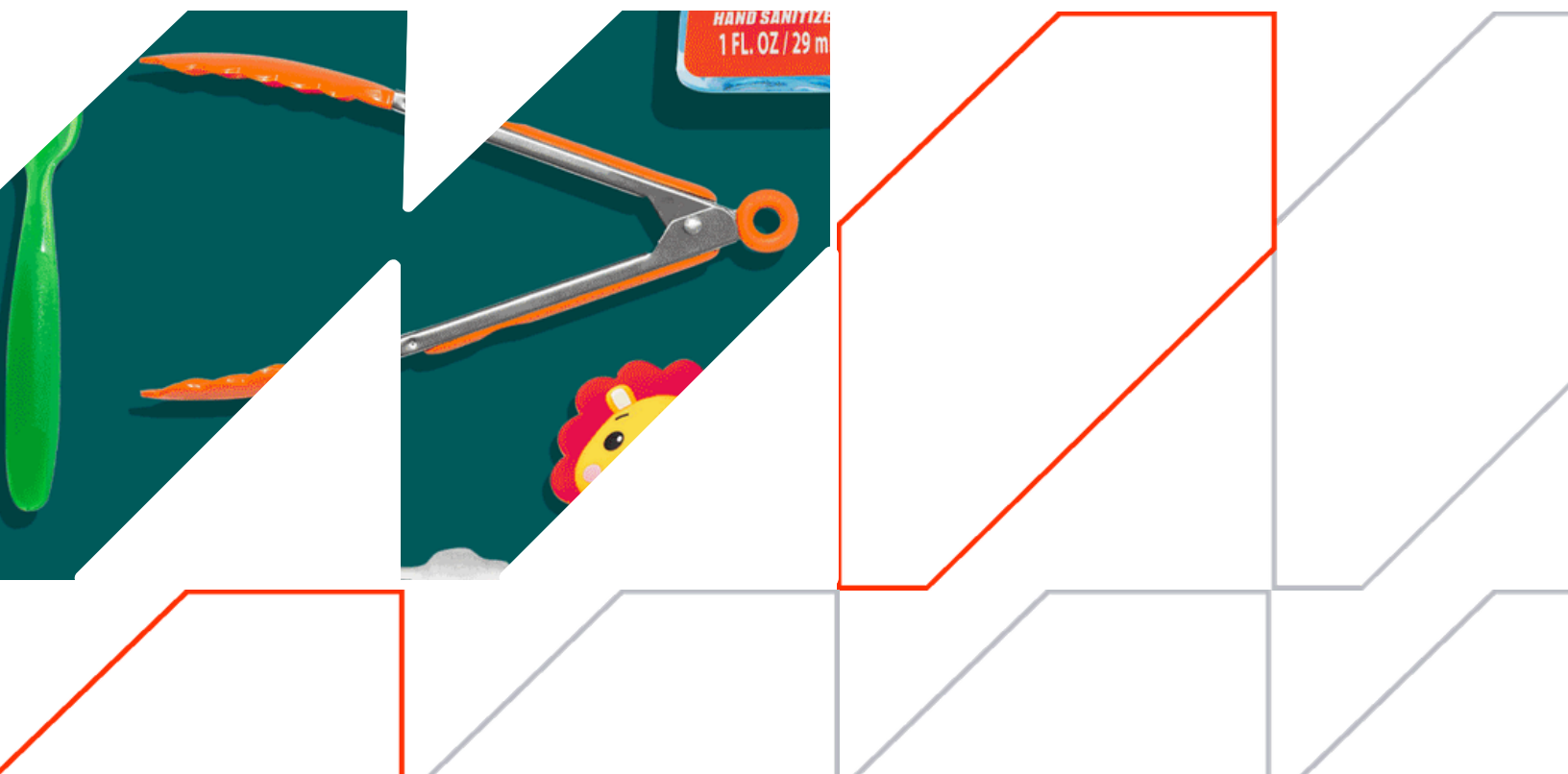
This model works best when a few key conditions are in place:

- **A clear mandate:** The client is clear on the goal, even if the path isn't.
- **Trust:** We're not on the sidelines; we're on the field, running plays we've designed with you, backed by 15 years of guiding our clients to championship seasons.
- **Access:** From warehouse floors to finance teams, we can move across your organization to make things happen with clarity.
- **Urgency:** This isn't about building a 3-year roadmap. Often, it's combination of "fix this now" and "show us what great looks like." We operate play-by-play with a proven playbook and adjust to needs in real time.

I'll admit, it's not always easy. But we're built for this kind of work. As consultants, we're often tasked to make recommendations with incomplete data, navigate organizational dynamics, identify gaps, and influence change. We know how to earn trust, move quickly, and execute under pressure.

Most importantly, we don't show up alone.

Our interim leaders bring the full strength of LIDD's bench — a team of operators, analysts, and technologists who can plug in immediately to stabilize performance and create momentum. We fill gaps fast, buying you time to plan for long-term structure, hire the right people, and execute with precision.



How A Leading CPG Company Leveraged An Interim Executive

Ashtel Studios — a consumer brands company — had grown steadily for over 20 years. Then COVID hit. Practically overnight, sales skyrocketed, growing over 1000% in sustainable business. Complexity surged: new customers, a larger fulfillment network, and major distribution challenges. Until that point, Ashtel had never needed an Operations Executive.

They had sufficient technology, strong operators and a capable team — operations lead, warehouse supervisor, inventory planner — but no one equipped to manage strategy and execution for a company of this new size and scale. In the face of urgent operational complexity, Ashtel needed someone who could lead from the front and bring order to the rapid expansion before fully investing in a new organizational structure.



What we got wasn't advice — it was a team that showed up and got to work immediately.

That's where I stepped in as Interim Head of Operations with a clear mandate:

- Stabilize the workforce to handle increased volume
- Leverage existing tech to boost productivity and visibility across the business
- Redesign the distribution network for scale and resilience
- March down the field with as many quick wins as possible along the way

ASHTEL
STUDIOS

Ashtel Studios delivers fun, design-forward products to retailers, distributors, and consumers alike

Here's How We Ran the Play:

1. Stabilize the Operation

We deployed LIDD team members to the most strained areas — order processing, transportation scheduling, and inventory control. While the HR team backfilled long-term roles, we raised service levels immediately with experienced support from our bench.

2. Unlock the Tech Stack

Many Ops leaders in middle-market companies haven't led digital transformations — we have. We quickly assessed existing systems, built clear business requirements for enhancements, and developed training aids to ensure tools were being used to their full potential — all while preparing for future upgrades.

3. Build the Roadmap

We balanced quick wins with long-term planning — mapping the future-state operation, identifying key gaps, and building a step-by-step plan to deliver immediate stability and strategic growth. This gave new hires a clear playbook to follow — and the confidence to run it.

Final Thought: One Leader on the Field, a Full Team Behind the Line

At LIDD, our interim leaders are never alone on the field. Behind every engagement is a coordinated team — ready to step in, run plays, and keep momentum going as needs evolve. It's an approach that brings more than individual expertise; it brings the collective experience, flexibility, and support structure needed to stabilize quickly and build toward long-term success.

We don't just hand over a playbook. We get in the game and run the hard plays with you (Even the dreaded inventory count).



From the Trenches: Why Your Project's Best Defense Is a **Subject Matter Expert**



Author: Marc Menard, Director

I've spent my career in the trenches of warehouse projects—navigating everything from massive new facility builds to the intricate rollout of automated systems. In my experience, the difference between success and a slow-motion disaster rarely comes down to a single piece of technology or a budget line item.

The real trouble starts when communication breaks down. It happens when your team, your vendors, and your integrators are all speaking different languages, with no one there to translate. Large-scale projects are complex beasts. Without the right person steering the ship—someone who can bridge the gaps, enforce accountability, and protect your investment—you're leaving the success of that investment to chance.

More Than a Project Manager—A Project Champion for Your Business

Let's be clear: overseeing your major system upgrade or facility build isn't a part-time job to hand off to someone with an already full plate. This is a full-time commitment that demands nearly 100% of their attention. This person is your subject matter expert (SME), your project champion, and most importantly, your fact checker.

Let's be clear on who's who. In this dynamic, we have the operator—the end-user whose business will either thrive or suffer based on the project's outcome. On the other side, we have your vendors and integrators—the companies hired by the end-user to supply the technology, build the equipment, or install the systems. As the operator, you want to be careful and ensure the system you are spending money on does exactly what you need it to do. As you get deeper into the project, you will likely discover new requirements. Your vendor, on the other hand, wants to stick to the contract and move fast, sometimes at the expense of crucial details. Your champion is the one who stands in the middle. They speak the languages of both parties, understand your big-picture business goals, and aren't afraid to have the hard conversations that keep everyone honest.

A Checklist for Keeping Your Project on the Rails

Success isn't magic; it's about discipline and foresight. Here's what your expert needs to control to protect your interests.

1. Get in Early and Shape the Contract

By the time a project moves from sales to execution, the contract is king. If crucial details like testing phases, change management, and acceptance criteria aren't baked into your contract from the start, you've already lost your leverage. An expert involved early ensures your contract reflects your operational reality, not just a vendor's optimistic sales pitch. And never forget payment terms are your biggest stick. Holding back even 10% until the final punch list is complete ensures the job isn't done until it's done right.

2. Demand Transparency

Projects thrive on honesty. A vendor might tell you there are "no delays" when they're already three weeks behind. Your champion's job is to force those uncomfortable conversations early and often. It's always better to tackle a small problem today—and have a Plan B and maybe even a Plan C ready—than to confront a massive one a month from now when it's already blown up your timeline.

3. Define the Checkpoints

Your project needs clear, non-negotiable milestones. These aren't just dates on a calendar; they're gates that keep your vendors accountable and the project aligned with your goals.

- **Design Reviews:** Nail down the requirements before anyone does anything.
- **Off-Site Acceptance Testing:** Test the solution in a controlled setting before it ever shows up at your facility.
- **On-Site & User Acceptance Testing:** Confirm it works in your environment, with your people, under real-world pressure.

4. Protect the Continuity

Momentum dies when key people leave. A vendor's project manager quits, or your internal expert gets pulled onto another priority, and suddenly, crucial project knowledge walks out the door. Your dedicated champion is constant. They maintain the weekly updates, the decision logs, and the institutional memory, ensuring your project doesn't stall every time a key player changes.



The Bottom Line

At the end of the day, you can't afford to be passive. Whether you're building a new warehouse or rolling out a WMS, you need a single point of accountability—an owner's rep, a dedicated PM, call it what you want. This isn't about outsourcing the work; it's about making sure every partner delivers exactly what they promised you. You don't always need to hire someone from the outside, but you absolutely need someone whose sole focus is protecting your interests. Without that central touchpoint, even your best-laid plans are just one misstep, one miscommunication, or one missed detail away from becoming a very expensive problem for your business. That's a risk no business should be willing to take.



Get Ready for **Rendezvous 2025**

October 23rd | Intercontinental Hotel | Montreal, QC

Connect, learn and **grow**



Rendezvous brings together our staff, clients, and partners from many industries and across LIDD's work in supply chain strategy, design, and technology. This cross-pollination is deliberate – by sharing stories with people working in varying realms, we hope to spur new ideas and connections.

www.LIDD/Rendezvous.com



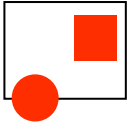
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If you would like to learn more about Insight Works and how they can help streamline manufacturing and distribution processes, reach out today:

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LIDD Supply Chain Consulting

LIDD is a full service, global operations and supply-chain consulting firm. Our industry leading team of design, strategy, and technology experts optimize operations, enhance productivity, and build intelligent infrastructure for sustainable business growth.



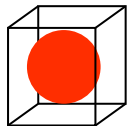
Supply Chain Strategy Consulting

We carefully consider your entire organizational structure. Our data-driven solutions are tailored to your specific business challenges, change management requirements, and future needs.



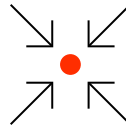
Supply Chain Technology

We select, implement, integrate, and support business management and supply chain execution software.



Distribution Center Design

Whether you're running out of space, operating inefficiently, or struggling with labour costs, we can help you reconfigure or automate your location to drive efficiencies.



Facility Implementation

Build ready-to-use facilities on time and on budget. We handle the entire transition process from RFP to equipment selection and implementation.



About LIDD

LIDD's office serves as a hub of supply chain expertise, delivering innovative solutions to businesses across North America. This quarter's newsletter was created through the concerted efforts of some members of the LIDD Consulting team.



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