

AI GROWTH AUDIT



An AI-First Blueprint for Commercial Growth

A board-ready assessment of Meridian's digital presence, competitive position, and the highest-value artificial-intelligence opportunities across marketing, sales and revenue operations.

68/100

DIGITAL MATURITY
COMPOSITE

12

AI GROWTH
OPPORTUNITIES

3 phase

6-MONTH ACTION
ROADMAP

25 pp

INDEPENDENT
ASSESSMENT

PREPARED FOR

Meridian Industrial — Executive Leadership

Central Europe · Global

DATE OF REPORT

May 2026

Confidential & Proprietary

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HOW TO READ THIS REPORT — EVIDENCE FRAMEWORK

OBSERVED

Confirmed from Meridian's public channels, filings and verifiable third-party sources.

ASSUMED

Informed inference from publicly available signals where private data is not disclosed.

RECOMMENDED

Shiftnode's strategic recommendation, prioritised by commercial impact and feasibility.

No private performance metrics, traffic figures, revenue by channel or ad spend have been invented. Where exact data is unavailable, the report states: "Based on publicly available signals, this appears to be..."

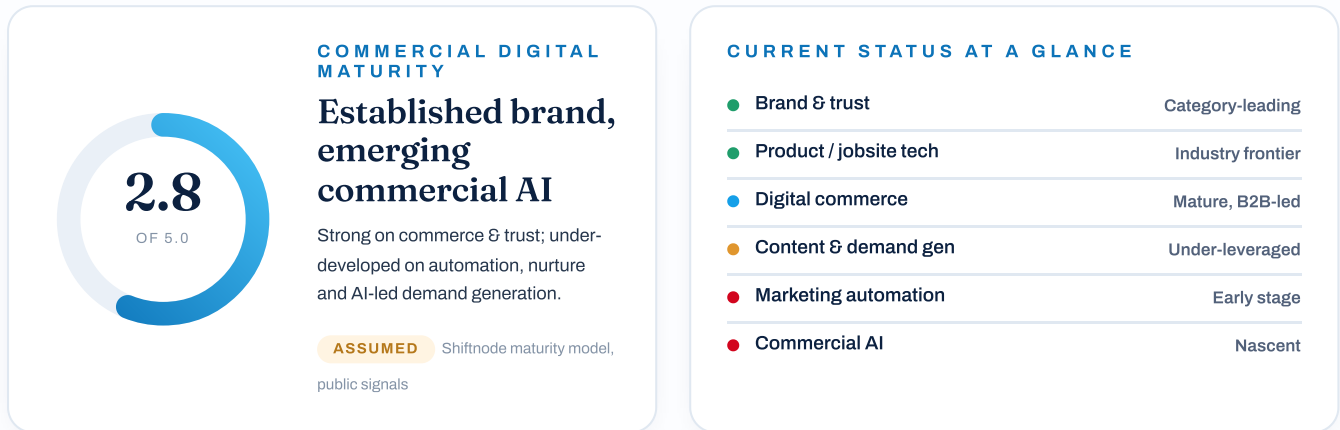
THE THESIS IN ONE LINE

Meridian is a world-class *product & jobsite-technology* innovator — yet its *commercial* AI (marketing, demand generation and sales) trails its engineering. That gap is the single largest, lowest-risk growth lever available today.

01 Executive Summary

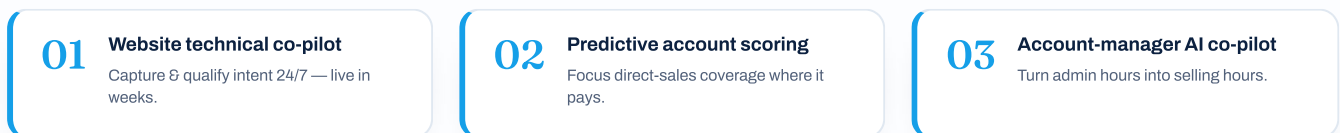
Where Meridian stands today, the barriers to faster growth, and the AI moves that will compound commercial advantage.

Meridian is one of the construction industry's most respected premium brands — built on engineering excellence, a famously loyal customer base and a direct sales force that is both its deepest moat and its largest cost. **The brand's digital and product technology is advanced; its commercial AI is not.** Closing that gap is the fastest route to more qualified pipeline, higher win rates, protected recurring revenue and a materially more productive go-to-market engine.



The headline recommendation

Treat AI as a **commercial** programme, not an IT project. Point it at the most expensive, highest-leverage parts of the revenue engine — the direct sales force, the digital funnel and recurring Fleet revenue — and sequence it into **Quick Wins within 30 days**, capability build in 60–90 days, and a scaled AI-first growth system within 6 months. Done well, this lifts qualified pipeline, shortens sales cycles and protects recurring revenue without diluting the premium brand.



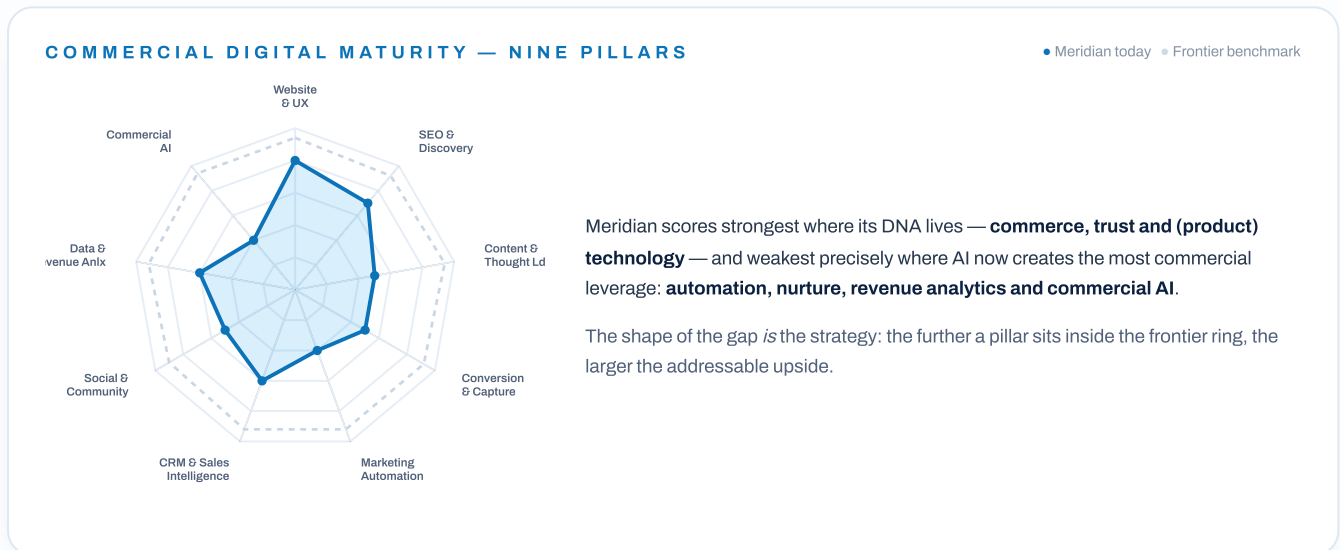
THE FIRST THREE MOVES — DETAILED IN SECTION 07

Main barriers to faster growth

- **High cost-to-serve.** A premium direct-sales model is the moat — and the single largest commercial cost. Every hour of low-value admin is margin foregone.
- **Thin top-of-funnel.** Demand generation leans on field relationships; the digital funnel under-captures and under-nurtures specifiers and smaller contractors.
- **Recurring revenue at risk.** The fleet programme and software create stickiness, but churn and upsell signals from tool data are not yet fully turned into commercial action.
- **Content & discoverability gap.** Deep technical authority is not matched by scaled, AI-search-ready content — ceding mind-share to more digitally aggressive rivals.
- **Fragmented commercial data.** Rich signals across e-commerce, app, CRM and fleet telematics are not unified into a single revenue-intelligence view.

Biggest commercial opportunities

- **Make the sales force superhuman.** An AI co-pilot for account managers — briefs, next-best-action, churn alerts — converts admin time into selling time.
- **Score & route demand.** Predictive lead and account scoring focuses expensive coverage on accounts most likely to buy and expand.
- **Win the self-serve buyer.** A website technical co-pilot guides product selection and spec, deflecting support and capturing intent 24/7.
- **Defend the annuity.** Fleet churn-and-upsell intelligence protects and grows recurring revenue.
- **Scale authority.** An AI content engine compounds organic demand across trades, languages and AI search.



↑

More qualified pipeline

Scoring, ABM and an always-on website assistant widen and pre-qualify top-of-funnel.

↪

Shorter sales cycles

Quote, proposal and submittal automation compress weeks of back-and-forth.

♻️

Protected recurring revenue

Fleet churn intelligence turns telematics into timely renewals and upsell.

Expected impact is directional and qualitative; no specific revenue percentages are claimed without client data. Quantification is established jointly in a discovery sprint.

“ *Meridian sells holes, not drills. The next chapter is selling intelligence, not just hours — AI that makes the world's best sales force the world's most informed one.* ”

SHIFTNODE DIGITAL — STRATEGIC POINT OF VIEW

02 Company Snapshot

Who Meridian is, the market it operates in, and the commercial model that AI must amplify.

OBSERVED

Overview

Meridian Industrial is a long-established, privately held manufacturer of premium tools, fasteners, systems, software and services for professional construction, building maintenance, energy and manufacturing. With a global footprint spanning well over 100 markets and tens of thousands of employees, it is engineering-led, premium-positioned, and guided by a long-range corporate growth strategy.

Meridian's identity is unmistakable: a signature brand colour, uncompromising quality, and a direct relationship with the jobsite. Its **protected brand colour** and premium design language signal a rare badge of category ownership.

POSITIONING

How the market sees Meridian

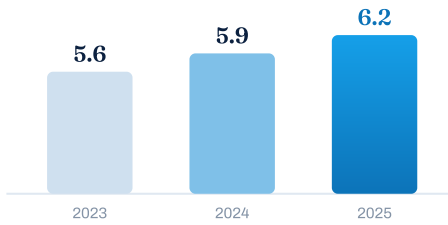
Meridian competes on **performance, safety and total productivity** — not price. Its promise is to be the customer's *best partner for productivity, safety and sustainability*, expressed through a premium, engineering-led brand.



ASSUMED — BRAND-PERCEPTION READ FROM PUBLIC SIGNALS

FINANCIAL SNAPSHOT · MERIDIAN INDUSTRIAL

ILLUSTRATIVE — SAMPLE FIGURES



Estimated group revenue (€ billion, illustrative). Underlying demand has grown steadily in recent years; profitability is premium-tier.

~12%
Operating margin (illus.)

€480M
Net income (illus.)

€520M
Free cash flow (illus.)

REGIONAL MOMENTUM — 2025 (LOCAL-CURRENCY DIRECTION)

Americas

▲ **Strong**

North America leading growth

Middle East / Africa

▲▲ **Double-digit**

Fastest-growing region

Europe

▼ **Soft**

Challenging construction market

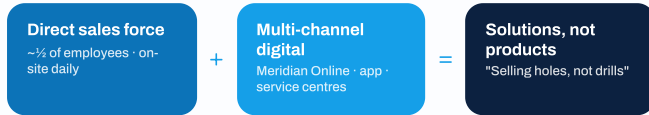
Asia / Pacific

▼ **Soft**

Demand under pressure

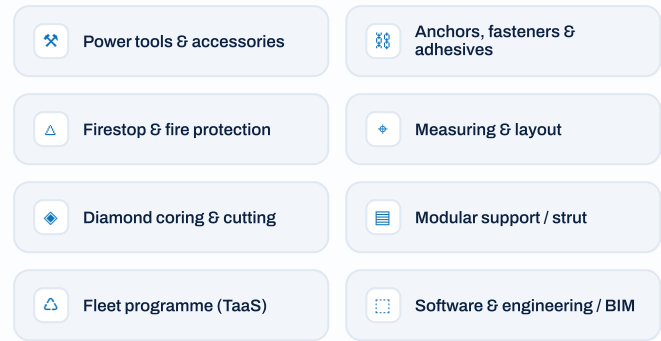
The business model

Meridian's defining choice is to sell **direct** — no distributors between the brand and the jobsite. Roughly half the workforce is customer-facing, generating an unmatched stream of real-world insight and loyalty. It is the deepest moat in the category — and the most expensive channel to run.



This evolved into recurring-revenue engines — a **tools-as-a-service fleet programme**, **asset-management software**, repair, BIM/engineering, and acquired software platforms. The model converts transactions into long-term, sticky relationships.

Core offer portfolio



ALREADY AN AI INNOVATOR — IN THE PRODUCT

Semi-autonomous jobsite robotics, a connected (IoT) cordless tool platform, and a dedicated computer-vision / IoT / AI research group prove Meridian can ship AI. The frontier now is applying that capability to **commercial growth**.

TARGET AUDIENCE — PROFESSIONAL END-USERS

- **General & trade contractors** — from regional firms to global GCs running large tool fleets.
- **Specialty subcontractors** — MEP, firestop, concrete, façade, formwork.
- **Engineers & specifiers** — structural / MEP designers who write Meridian into the spec.
- **Facility & asset owners** — building maintenance, energy, manufacturing.

Professional-only; Meridian deliberately does not chase the DIY segment.

MARKET CONTEXT

The construction market is large, cyclical, fragmented and historically slow to digitise. Meridian is deliberately leading a **"Construction 4.0"** shift — robotics, software and data on the jobsite — while navigating an uncertain 2026 outlook, a strong franc and shifting tariffs.

2030

Strategy horizon

100+

Markets served

80+ yrs

Engineering heritage

03 Digital Presence Audit

A dimension-by-dimension read of Meridian's commercial digital estate — scored, with the strengths to protect and the gaps to close.

COMPOSITE SCORE

68/100

Grade C+

Established estate, premium where it counts — with disproportionate upside in automation, nurture and AI.

HOW TO READ THE SCORECARD

Each dimension is scored 0–100 against a **frontier B2B benchmark** (best-in-class digital demand engines, not just construction peers). Scores are an informed read of public-facing signals — not internal analytics — and are deliberately conservative.

● Strength to protect (80+) ● Solid, optimise (66–79) ● Underdeveloped (56–65) ● Priority gap (≤55)

ASSUMED Shiftnode scoring framework applied to publicly observable signals.

DIMENSION	SCORE	PERFORMANCE	ONE-LINE VERDICT
Website & UX	B+		Enterprise-grade commerce; dense for first-time / self-serve buyers.
Messaging clarity	B		Authoritative productivity story; the AI/innovation story is under-told.
SEO visibility	B		High authority on product terms; light on top-funnel & AI-search.
Social media presence	C		Solid corporate channels; low community energy vs. tool rivals.
Content strategy	C		Pockets of excellence, not yet a scaled demand engine.
Conversion paths & CTAs	C-		Gearred to "contact sales"; thin self-serve guidance & capture.
Lead generation	C-		Relationship-led; digital lead capture & routing under-built.
Funnel quality	C-		Top-funnel thin; mid-funnel nurture largely absent.
Commercial AI adoption	C-		World-class <i>product</i> AI; go-to-market AI still nascent.
Marketing automation	D+		Early stage; limited personalisation & lifecycle nurture.
Trust & credibility	A-		Outstanding brand proof, awards & loyalty — a true asset.

Read of the scorecard: Meridian is strongest exactly where its brand DNA lives and weakest exactly where modern AI creates the most commercial leverage. The estate is not broken — it is *under-monetised*.

Website & User Experience

B+

Based on publicly available signals, the Meridian website is a mature, enterprise-grade B2B commerce platform: deep product data, transactional account features, Fleet and repair self-management, and BIM/engineering resources. It is built for the *known*, logged-in professional — less so for the new specifier or smaller contractor arriving cold.

STRENGTHS

- Rich, accurate product & technical data with strong search within catalogue.
- Powerful account tools — buy, manage Fleet, request repair in a click.
- Robust engineering / BIM utilities that reinforce specifier loyalty.

GAPS & FRICTION

- Dense for first-time visitors; high cognitive load before value is clear.
- Guidance ("which product for my job?") is thin without a rep.
- Mobile jobsite context — quick reorder, spec lookup — can be smoother.

RECOMMENDED

A conversational **technical co-pilot** turns the catalogue into a guided, self-serve advisor — lowering load, lifting conversion and capturing intent.

Messaging & Positioning

B

Meridian's messaging is confident and coherent — productivity, safety and sustainability. The premium promise is unmistakable. What is under-told is the **innovation and AI story** that could decisively differentiate Meridian as the construction industry's technology leader, not only its quality leader.

STRENGTHS

- Clear, consistent value pillars across markets and channels.
- Outcome-led language ("holes, not drills") that buyers understand.
- Trusted, premium tone that justifies price and partnership.

GAPS & FRICTION

- The AI / Construction-4.0 narrative is buried, not headlined.
- Limited segment-specific messaging by trade, role or project phase.
- ROI / productivity proof is asserted more than dynamically demonstrated.

RECOMMENDED

Lead with an **"AI-first construction partner"** narrative and tailor messaging dynamically by trade & role — turning a strong story into a personalised one.

NET READ — WEBSITE & MESSAGING

The foundations are strong. The opportunity is not a rebuild — it is **intelligence layered on top**: guidance, personalisation and an AI-forward story.

Layer,
don't rebuild.

SEO, Discoverability & Content

B / C

Meridian enjoys high domain authority and ranks strongly on **product and technical queries** — people who already know what they need find Meridian. The weakness is the **top of the funnel**: the "how do I...", "which anchor for...", "best way to..." questions where buyers form preferences. That demand is being answered by rivals, forums and increasingly by AI assistants — often without Meridian in the frame.

STRENGTHS

- Authoritative on product, spec and compliance search terms.
- Deep technical library (approvals, design data) competitors can't match.
- Credible "Meridian Stories" and engineering content when published.

GAPS & FRICTION

- Thin, inconsistent top-funnel / educational content by trade.
- Not yet optimised for AI search & answer engines (GEO / AEO).
- Content production is artisanal, not a scaled, multilingual engine.

RECOMMENDED

An **AI content engine** compounds trade-specific, multilingual, AI-search-ready authority — capturing demand *before* the buyer reaches a competitor.

Conversion Journey & Lead Generation

C-

The digital journey is optimised for the **existing, logged-in customer** and for "contact sales." For the *new* or self-directed buyer, the path to value — and Meridian's path to capturing that lead — is under-built. With a premium direct-sales force, every digitally-surfaced, well-qualified lead is unusually valuable: it makes expensive coverage more productive.

STRENGTHS

- Frictionless reorder & account actions for known customers.
- Strong offline-to-online bridge via the account-manager relationship.
- High-intent product pages that convert ready buyers well.

GAPS & FRICTION

- Few progressive lead-capture moments (tools, calculators, gated value).
- Limited automated nurture between first touch and sales-readiness.
- No visible predictive scoring to route & prioritise inbound demand.

RECOMMENDED

Add interactive value (selectors, design & ROI tools) + **predictive scoring & automated nurture** to convert anonymous traffic into prioritised, sales-ready pipeline.

WHERE THE FUNNEL LEAKS TODAY — AND WHERE AI SEALS IT





Social & Community

C

Strong, professional corporate presence (notably LinkedIn & recruiting) — but lower day-to-day community energy than tool-culture rivals who own the trades' attention with creators, demos and UGC.

STRENGTHS

- Credible employer & corporate brand on LinkedIn.
- High-quality product & jobsite imagery.

GAPS

- Limited creator / trades-community engagement.
- Under-used short-form & demonstration formats.



Trust & Credibility

A-

A genuine asset. Decades of quality reputation, design awards, safety leadership, "best place to work" recognition and famously high loyalty give Meridian proof most B2B brands can only envy.

STRENGTHS

- Award-winning product innovation and design.
- Deep approvals, testing & compliance credibility.

MISSED LEVERAGE

- Proof is under-deployed at the point of conversion.
- Few dynamic case studies / ROI calculators by segment.

SYNTHESIS — STRENGTHS TO PROTECT, WEAKNESSES TO FIX, OPPORTUNITIES TO SEIZE

Strengths to protect

- Premium brand & pricing power
- Direct relationship & loyalty
- Technical authority & compliance
- Recurring Fleet / software revenue
- Proven product-AI capability

Weaknesses to fix

- Thin top-of-funnel demand gen
- Early-stage marketing automation
- Under-built self-serve conversion
- Fragmented commercial data
- Under-told AI / innovation story

Missed opportunities

- AI co-pilot for the sales force
- Predictive scoring & routing
- Website technical assistant
- Fleet churn / upsell intelligence
- Scaled AI content & AI-search

SECTION VERDICT

Meridian's digital estate is a *premium house on strong foundations* — with the upstairs unfurnished. The fastest returns come not from construction, but from installing intelligence in the rooms already built.

04 Competitor Landscape

The rivals shaping digital expectations in Meridian's categories — and where each is pulling ahead on demand generation and AI.

Meridian competes on two fronts: **premium power-tool ecosystems** (Milwaukee, DeWALT, Bosch, Makita) and the **fastening / direct-sales arena** (Würth above all, plus specialists like Fischer and Simpson Strong-Tie). Two rivals matter most for this audit: **Würth**, whose direct-sales-plus-e-commerce model mirrors Meridian's at greater digital scale, and **Milwaukee (TTI)**, the benchmark for trades community, content and connected-tool data.

Würth Group

CLOSEST MODEL RIVAL

Direct sales + multichannel · Fasteners / MRO / tools · Family-owned (DE)

The structural mirror of Meridian — a vast direct field force *and* an industrial-scale e-commerce / digital-procurement engine (apps, scanners, vending, ERP integration). Out-scales Meridian on transactional digital breadth.

Digital edge: e-commerce & procurement integration. **AI signal:** data-driven replenishment & ordering.

Milwaukee — TTI

DIGITAL BENCHMARK

Cordless ecosystem · Brookfield, WI · Aggressive innovation cadence

Owns the trades' attention online — relentless content, creators, UGC and the **ONE-KEY** connected-tool platform (tracking, inventory, customisation). Sets the bar for community-led demand and tool-data products.

Digital edge: community, content & connected-tool data. **AI signal:** ONE-KEY analytics & security.

DeWALT — Stanley B&D

STRONG DIGITAL SCALE

Broad pro tools · Towson, MD · Retail + pro channels

Massive reach across pro and retail, large social footprint and the **Tool Connect** tracking ecosystem. SBD is investing in digital commerce and data, leveraging scale Meridian does not have in retail.

Digital edge: omnichannel reach & brand volume. **AI signal:** connected inventory; SBD data initiatives.

Bosch Professional

ENGINEERING + IOT

Broad pro tools · Engineering depth (DE) · Connectivity-led

Deep engineering brand with connected-tool features and the **Bosch Toolbox** app. Strong in measuring/layout and increasingly in jobsite connectivity — a credible technology narrative.

Digital edge: connected tools & engineering trust. **AI signal:** sensor data & smart-tool features.

ALSO IN FRAME

Makita — broad cordless strength, more conservative on marketing/digital. **Fischer & Simpson Strong-Tie** — fastening / anchor specialists; Simpson's specifier software & engineering tools are a notable digital benchmark for winning the *specification*.

6th

Meridian's revenue rank among its top-10 publicly-tracked competitors (Observed, third-party)

WHY THIS MATTERS

The pressure is digital, not mechanical.

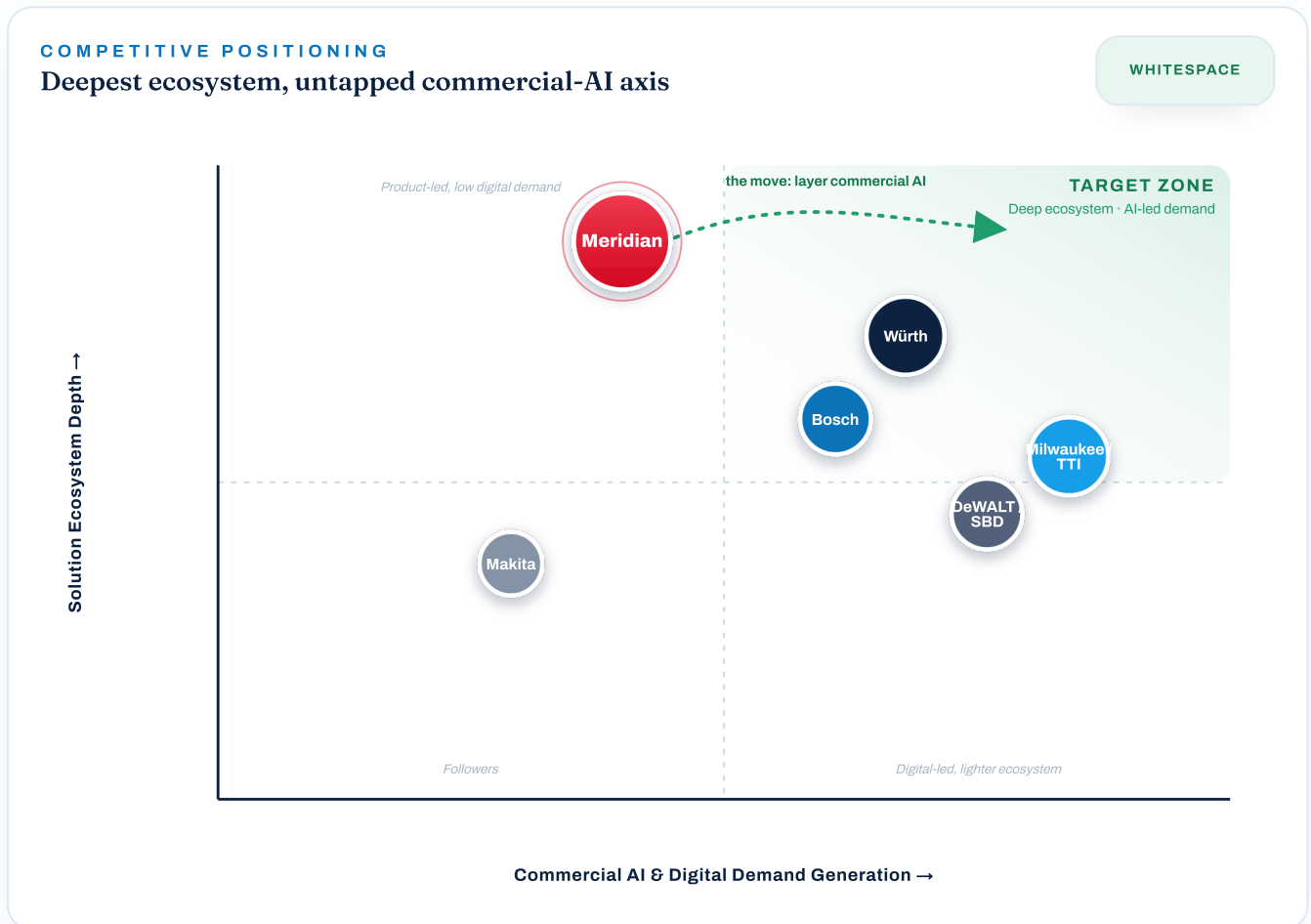
No rival out-engineers Meridian on the jobsite. They compete on **how easily a professional can discover, specify, buy and reorder** — and on the intelligence behind every commercial touch. That is exactly where the next section finds Meridian's largest, most defensible growth: not building better tools, but making the commercial engine as smart as the products.

Digital & Commercial Maturity — Where Everyone Stands

Scored 1–5 on the **commercial** dimensions that drive demand and revenue — not product engineering, where Meridian leads. These are directional estimates from public-facing signals, to be validated in discovery.

COMPETITOR	DIGITAL COMMERCE	CONTENT / SEO	COMMUNITY / SOCIAL	MKTG AUTOMATION	COMMERCIAL AI	AVG
Milwaukee / TTI	3.5	4.5	4.7	3.5	3.0	3.8
DeWALT / SBD	3.8	3.8	3.8	3.5	3.0	3.6
Würth	4.5	3.5	3.0	3.5	3.0	3.5
Bosch Prof.	3.5	3.5	3.2	3.2	3.2	3.3
Meridian	3.5	2.8	2.5	2.0	2.0	2.6
Makita	2.8	2.8	2.5	2.2	1.8	2.4

Scale: 1 = nascent · 3 = competent · 5 = frontier. Meridian's *product & jobsite* AI would score 4–5 — the gap is specifically in **commercial AI**.



How Meridian Wins — Differentiation Through Commercial AI

Meridian should not copy Milwaukee's community playbook or Würth's catalog commerce. Its winning moves compound assets rivals *cannot* easily replicate — a direct-sales relationship at scale, a deep solution ecosystem, and proprietary tool & jobsite data.

01 Own the specification moment

RIVALRY Simpson Strong-Tie & Bosch win early influence with specifier & engineering tools; Milwaukee owns the trades' attention.

MERIDIAN'S LEAPFROG

An AI technical co-pilot for engineers, specifiers & GCs — anchor design, firestop, BIM and submittal generation — embeds Meridian into the spec *before* the bid. Hardest moment to win; richest to own.

02 Weaponize the direct-sales army

RIVALRY Sell through distribution; none field a customer-facing force of Meridian's scale (~half of all staff).

MERIDIAN'S LEAPFROG

An account-manager AI co-pilot — next-best-action, churn signals, auto-briefs — turns the costliest moat into the smartest. No competitor can match this lever because none owns the relationship.

03 Monetize proprietary tool data

RIVALRY Milwaukee ONE-KEY & DeWALT Tool Connect collect data; mostly for tracking, not revenue intelligence.

MERIDIAN'S LEAPFROG

The fleet programme + connected-tool telematics become a predictive engine — utilization-based upsell, consumable reorder, churn prevention. Meridian already sells the *relationship*; AI makes it self-optimizing.

04 Make productivity personal

RIVALRY Broadcast generic content & promotions across broad trade audiences.

MERIDIAN'S LEAPFROG

AI personalization by trade, role & project phase turns Meridian's productivity-and-safety promise into a 1:1 message — the right anchor, tool or service at the right jobsite moment.

”

The competitive takeaway

Meridian's rivals are racing on **digital reach**. Meridian should race on **digital intelligence** — applying AI to the assets it uniquely owns: the relationship, the ecosystem and the data. That is a defensible position competitors cannot buy or copy quickly, and it is the foundation for every opportunity that follows.

05 AI Growth Opportunities

Twelve concrete, prioritized opportunities to apply AI across Meridian's commercial engine — demand generation, the direct-sales force, and recurring Fleet revenue.

Meridian has already proven it can lead with AI in the *product* — robotics, connected tools and asset platforms. The opportunity now is to point that same ambition at the **commercial** side of the business, where the maturity gap is widest and the revenue upside is largest.

OPERATING PRINCIPLE

Layer intelligence, don't rebuild.

Every opportunity below is designed to sit *on top of* Meridian's existing CRM, e-commerce, Fleet and data assets — not to replace them. This keeps risk low, time-to-value short, and adoption realistic for a direct-sales culture.

THE PORTFOLIO AT A GLANCE

5 Quick Wins

30–90 days · low complexity

- 01 Predictive Lead & Account Scoring
- 02 Website Technical Co-Pilot
- 03 Marketing Personalization
- 04 Content Engine for Trade & AI-Search
- 05 Internal Productivity Copilots

Fast proof, momentum & budget for the bigger bets.

5 Strategic Bets

Quarters · high impact

- 06 Account-Manager Co-Pilot
- 07 Quote, Proposal & Submittal AI
- 08 Fleet & Churn Intelligence
- 09 Account-Based Marketing
- 10 Revenue Intelligence Cockpit

The defensible, compounding growth engines.

2 Operational

Continuous · efficiency

- 11 Conversational Commerce & Reorder
- 12 Support & Service Automation

Protect recurring revenue and lower cost-to-serve, freeing reps for high-value selling.

THE THROUGH-LINE

Three levers, one connected growth system



Win more demand

Capture and convert more of the market already searching, specifying and visiting.

02 · 03 · 04 · 09



Sell more efficiently

Make the expensive direct-sales engine faster, smarter and better targeted.

01 · 05 · 06 · 07 · 10



Keep & grow accounts

Defend and expand recurring Fleet revenue and protect the premium service promise.

08 · 11 · 12

Each opportunity is detailed on the following pages, then scored and sequenced in Sections 06–07.

RECOMMENDED

Quantified business cases are developed in a focused discovery sprint.

01

QUICK WIN

Predictive Lead & Account Scoring

IMPACT
High

BUILD
Low

THE GAP

Leads and accounts are worked largely on heuristics and tenure, not propensity to buy or grow.

AI SOLUTION

ML scoring ranks every lead and account by conversion and expansion probability, routing rep time to the highest-value targets.

COMMERCIAL IMPACT

Higher conversion and smarter coverage with no added headcount.

IN PRACTICE *Surface the 200 accounts most likely to expand into Fleet this quarter — before a rep has to guess.*

ENABLERS

CRM data

Propensity model

Lead routing

02

QUICK WIN

AI Website Technical Co-Pilot

IMPACT
High

BUILD
Medium

THE GAP

Product selection, spec and BIM guidance need human help; web visitors self-serve poorly and drop off.

AI SOLUTION

A conversational co-pilot guides anchor, firestop and tool selection, answers technical questions and captures qualified leads 24/7.

COMMERCIAL IMPACT

Converts anonymous traffic into specified, sales-ready demand.

IN PRACTICE *A contractor describes a fastening job and gets the right anchor, load data and a one-click quote request.*

ENABLERS

RAG / product data

Lead capture

Multilingual

03

QUICK WIN

Marketing Personalization & Dynamic Content

IMPACT
Med-High

BUILD
Medium

THE GAP

Web and email experiences are largely one-size-fits-all across very different trades and roles.

AI SOLUTION

AI personalizes web, email and offers by trade, role and project phase in real time.

COMMERCIAL IMPACT

Lifts engagement and pipeline from existing traffic — no new spend.

IN PRACTICE *An electrician and a structural engineer land on different homepages, products and proof points.*

ENABLERS

CDP

Personalization

Content variants

04
QUICK WIN

AI Content Engine for Trade & AI-Search

IMPACT **Medium** BUILD **Low**

THE GAP

Content is thin for SEO and largely invisible to AI answer engines (GEO / AEO).

AI SOLUTION

An AI content engine produces trade-specific, multilingual, structured content optimized for search and AI assistants.

COMMERCIAL IMPACT

Captures demand at the research moment — including new AI-search surfaces.

IN PRACTICE *Auto-generated, localized firestop guides that rank in search and get cited by AI assistants.*

ENABLERS Gen-AI content Structured data Multilingual

05
QUICK WIN

Internal Productivity Copilots

IMPACT **Medium** BUILD **Low**

THE GAP

Commercial teams lose hours to RFPs, localization, reporting and admin.

AI SOLUTION

Role-specific copilots draft RFP responses, localize content, summarize accounts and automate reporting.

COMMERCIAL IMPACT

Returns selling time to the commercial org within weeks.

IN PRACTICE *A rep produces a tailored, on-brand RFP response in minutes instead of hours.*

ENABLERS LLM copilots Localization Reporting

06
STRATEGIC BET

AI-Augmented Account-Manager Co-Pilot

IMPACT **Very High** BUILD **High**

THE GAP

Roughly half of all staff are customer-facing, yet reps lack real-time, data-driven guidance on who to call and why.

AI SOLUTION

A co-pilot surfaces next-best-action, auto-generated account briefs, cross-sell prompts and churn signals from CRM, Fleet and ordering data.

COMMERCIAL IMPACT

Amplifies the most expensive — and most defensible — asset Meridian owns.

IN PRACTICE *Every morning, each rep gets a ranked call list with the reason and a ready-made talking brief.*

ENABLERS CRM integration Data unification Next-best-action

07

STRATEGIC BET

Quote, Proposal & Submittal Automation

IMPACT
High

BUILD
Med-High

THE GAP

Quotes, proposals and submittals are slow, manual and inconsistent across markets.

AI SOLUTION

AI assembles quotes, spec packages and submittals from product data, pricing rules and project context.

COMMERCIAL IMPACT

Compresses sales cycles and raises win-rates on specified work.

IN PRACTICE *A complete, compliant submittal package assembled from the catalog in one click.*

ENABLERS

Document AI

Pricing rules

Template gen

08

STRATEGIC BET

Fleet & Churn Intelligence

IMPACT
Very High

BUILD
High

THE GAP

Tool telematics and fleet-programme data are underused for predicting churn and expansion.

AI SOLUTION

Predictive models flag at-risk fleets and surface utilization-based upsell and renewal timing from telematics.

COMMERCIAL IMPACT

Protects and grows the highest-margin recurring revenue stream.

IN PRACTICE *Flag a fleet whose usage dropped 50% — and prompt the rep — before the customer calls a competitor.*

ENABLERS

Telematics data

Churn model

Revenue ops

09

STRATEGIC BET

AI-Enabled Account-Based Marketing

IMPACT
High

BUILD
Med-High

THE GAP

GCs and specifiers are pursued by reps but rarely orchestrated with marketing at the account level.

AI SOLUTION

AI-driven ABM identifies target accounts, reads intent signals and orchestrates personalized rep-plus-marketing plays.

COMMERCIAL IMPACT

Wins large, specified projects earlier in the cycle.

IN PRACTICE *Detect a major project breaking ground and trigger a coordinated specifier-plus-rep play.*

ENABLERS

Intent data

Account ID

Orchestration

10

STRATEGIC BET

Revenue Intelligence & Forecasting Cockpit

IMPACT
High

BUILD
High

THE GAP

CRM, e-commerce and Fleet data sit in silos; forecasting is manual and backward-looking.

AI SOLUTION

A unified cockpit blends signals into pipeline health, forecasts and growth-driver analytics for commercial leaders.

COMMERCIAL IMPACT

Sharper allocation of sales effort and more reliable forecasting.

IN PRACTICE *One screen blends pipeline, e-commerce and Fleet signals into a live, trustworthy forecast.*

ENABLERS

Data unification

Forecast model

Exec dashboards

11

OPERATIONAL

Conversational Commerce & Reorder

IMPACT
Medium

BUILD
Medium

THE GAP

Reordering consumables and replenishing fleets is manual and rep-dependent.

AI SOLUTION

Conversational reorder and automated replenishment tied to connected-tool consumables and real usage patterns.

COMMERCIAL IMPACT

Defends recurring revenue and frees reps for higher-value work.

IN PRACTICE *Reorder consumables by chat, with replenishment suggested automatically from real tool usage.*

ENABLERS

E-com integration

Usage signals

Chat / voice

12

OPERATIONAL

Customer Support & Service Automation

IMPACT
Medium

BUILD
Medium

THE GAP

Repair, Fleet and technical queries load human teams; resolution quality is uneven.

AI SOLUTION

AI triage plus a rep-facing copilot resolve repair, Fleet and technical requests faster, escalating only when needed.

COMMERCIAL IMPACT

Cuts cost-to-serve while upholding the premium service promise.

IN PRACTICE *Instant triage of a repair request, with the rep copilot drafting the resolution to approve and send.*

ENABLERS

Support AI

Knowledge base

Rep assist

06 Prioritization Matrix

All twelve opportunities mapped by business impact against implementation effort — a clear, defensible sequence for where to start.



Start here — Do First

Opportunities **01–05** cluster top-left: real impact, low effort. They fund and de-risk everything that follows. Begin inside 30 days.

Commit — Strategic Projects

The **06** Account-Manager Co-Pilot and **08** Fleet & Churn Intelligence carry the highest impact. Higher build, but the most defensible growth.

Run continuously — Operational

Operational plays **11–12** steadily protect recurring revenue and cut cost-to-serve, returning rep time to selling.

Weighted Prioritization Scoring

Each opportunity scored 1–5 across five weighted criteria, producing a single ranked score. This converts judgement into a transparent, debatable sequence — adjust the weights and the order updates with your strategy.

WEIGHTING | **30%** Business Impact | **25%** Revenue Potential | **20%** Speed-to-Value | **15%** Strategic Importance | **10%** Ease of Build

#	ID	OPPORTUNITY	IMPACT	REVENUE	SPEED	STRATEGIC	EASE	WEIGHTED SCORE	CATEGORY
1	08	Fleet & Churn Intelligence	5	5	2.5	5	2	84	STRATEGIC
2	01	Predictive Lead & Account Scoring	4	4	5	3	5	83	QUICK WIN
3	06	Account-Manager Co-Pilot	5	5	2	5	1.5	81	STRATEGIC
4	02	Website Technical Co-Pilot	4	4	4	4	3	78	QUICK WIN
5	07	Quote, Proposal & Submittal AI	4	4	3	4	2.5	73	STRATEGIC
6	09	Account-Based Marketing	4	4	3	4	2.5	73	STRATEGIC
7	04	Content Engine — Trade & AI-Search	3	3	5	3	5	72	QUICK WIN
8	03	Marketing Personalization	3.5	3.5	4	3	3	70	QUICK WIN
9	05	Internal Productivity Copilots	3	2.5	5	3	5	70	QUICK WIN
10	10	Revenue Intelligence Cockpit	4	3.5	2.5	4.5	2	69	STRATEGIC
11	11	Conversational Commerce & Reorder	3	3.5	3.5	3	3.5	66	OPERATIONAL
12	12	Support & Service Automation	3	2.5	3.5	3	3.5	60	OPERATIONAL

HOW TO READ THE RANKING

The **Quick Wins** rise to the top on speed and ease — they should start immediately. The **Account-Manager Co-Pilot** and **Fleet & Churn Intelligence** score highest on raw impact and strategic value; they rank slightly lower only because they take longer to build. The action plan therefore runs both tracks in parallel — quick wins now, strategic bets in motion behind them.

07 Recommended Action Plan

A pragmatic, three-phase path from first proof to a scaled, AI-first commercial system — running quick wins and strategic bets in parallel.



PHASE 1

Foundation & Quick Wins

Days 0–30 · prove value, unify the essentials, build momentum

Objective

Fast, visible wins that fund and de-risk the bigger bets.

WORKSTREAM	WHAT HAPPENS	OWNER	OUTCOME
■ Discovery & data audit	Map CRM, e-commerce, Fleet & content data; define value cases and baseline metrics.	Shiftnode + Data/IT	Prioritized backlog & baselines
■ Quick-win launch (01-02)	Pilot predictive lead scoring and a website technical co-pilot on one focused market.	Marketing + Sales Ops	First AI-sourced leads
■ Productivity copilots (05)	Roll out RFP, reporting & account-summary copilots to a pilot sales team.	Sales Enablement	Rep hours returned
■ Governance & guardrails	Stand up data-privacy, security and brand guardrails plus an adoption plan.	IT / Legal + Shiftnode	Green-lit operating model

TRACK FROM DAY ONE

AI-sourced leads

Pilot conversion lift

Rep hours saved

Gate → validated value cases unlock Phase 2 funding

Co-pilot engagement

PHASE 2

Build the Core Engines

Days 30–90 · stand up strategic capabilities on the validated foundation

Objective

Turn proof into durable, compounding capability.

WORKSTREAM	WHAT HAPPENS	OWNER	OUTCOME
■ Account-Mgr Co-Pilot v1 (06)	Next-best-action and auto-briefs for one region's sales team.	Sales Ops + Data Science	Adoption & pipeline lift
■ Personalization & content (03-04)	Dynamic web/email and AI content scaled across priority trades and markets.	Marketing	Engagement & ranking
■ Quote & submittal pilot (07)	Automated submittal generation for one product line.	Sales Ops + Product	Quote cycle-time down
■ Data unification	Foundational pipelines that will feed the revenue cockpit and churn models.	Data / IT	Unified data layer

WATCH

Co-pilot adoption %

Pipeline influenced

Quote cycle-time

Gate → adoption & ROI thresholds unlock scale

PHASE 3

Scale & Compound

Months 3–6 · scale what works; launch the recurring-revenue engines

Objective

An AI-first commercial operating system.

WORKSTREAM	WHAT HAPPENS	OWNER	OUTCOME
■ Scale Co-Pilot (06)	Roll the account-manager co-pilot across regions with local tuning.	Sales Ops	Productivity at scale
■ Fleet & Churn Intelligence (08)	Launch predictive churn & upsell from tool telematics.	Data Science + Fleet	Retention & expansion
■ Revenue Cockpit & ABM (09-10)	Leadership forecasting cockpit; AI-orchestrated ABM for top specifiers/GCs.	Rev Ops + Marketing	Forecast accuracy
■ Service & commerce automation (11-12)	Conversational reorder and AI support triage rolled out.	Service + Digital	Lower cost-to-serve

WATCH

Churn / retention

Fleet expansion

Share-of-wallet

Cost-to-serve

Outcome → compounding, defensible growth

The 6-Month Roadmap

Quick wins start immediately and run in parallel with the strategic builds, so value lands early while the compounding engines come online behind them.



WHAT SUCCESS LOOKS LIKE BY MONTH SIX

↑

Demand

More qualified, AI-sourced pipeline from the same traffic and spend.

⚙️

Sales efficiency

Reps spending more time selling and more on the right accounts.

↺

Retention

Earlier churn signals and utilization-based Fleet expansion.

🎯

Visibility

One trusted view of pipeline, forecast and growth drivers.

RECOMMENDED

Specific targets and ROI are set against the baselines captured in the Phase 1 discovery sprint, then reviewed at each phase gate.

08 Final Recommendations

Where Meridian should focus first, and the few decisions that matter most for AI-driven commercial growth.

THE ONE-LINE STRATEGY

Meridian already builds the smartest tools on the jobsite. The next decade of growth comes from making its *commercial engine* just as intelligent — and that advantage is Meridian's to take, because it sits on assets no competitor can copy.

FIVE RECOMMENDATIONS

1

Prioritize commercial AI, not more product AI

The engineering org already leads. The gap — and the larger, lower-risk upside — is in marketing, demand generation and sales. Point the same ambition there.

2

Start now with quick wins to fund the journey

Lead scoring, a website technical co-pilot and productivity copilots can launch in weeks, proving value and creating the momentum and budget for the strategic bets.

3

Make the Account-Manager Co-Pilot the flagship

Meridian's direct-sales force is its deepest moat and biggest cost. An AI co-pilot that guides every rep is the single highest-impact move — and one rivals cannot replicate.

4

Turn tool & fleet data into a retention engine

Telematics from connected tools and the fleet programme can predict churn and surface expansion. Convert a service relationship into a self-optimizing, recurring-revenue system.

5

Unify data and run the system from one cockpit

Connect CRM, e-commerce and Fleet signals into a single revenue-intelligence view, so leadership can steer the AI-first commercial engine with confidence.

The window is open — and it favours the company that already owns the data, the relationships and the trust.

Every quarter, AI raises what buyers expect from a vendor's digital experience and what a sales force can deliver per rep. Meridian starts from a position most competitors would envy. The risk is not moving too fast — it is letting a more digital challenger set the pace on a field where Meridian's underlying assets should win.

THE COST OF WAITING

- Challengers convert Meridian's engineering reputation into **digital demand** Meridian should be capturing.
- Account managers keep spending selling time on admin that AI could absorb.
- Churn and white-space signals stay buried in tool & Fleet data nobody activates.
- Each delay compounds — models, data pipes and rep habits all take time to mature.

THE PRIZE

- A commercial engine as intelligent as the products — compounding, not one-off.
- Every rep guided by the best next action; more selling, less searching.
- Retention and expansion that run on signals rivals simply cannot see.
- A defensible, AI-first growth system built on assets no competitor can copy.

HOW SHIFTNODE CAN HELP — A LOW-RISK WAY TO START

01

WEEKS 1-4

Discovery Sprint

Validate the opportunities against Meridian's real data, systems and goals. Quantify the prize and confirm the quick wins worth launching first.

02

WEEKS 4-8

Roadmap & Business Case

A sequenced, costed plan with owners, success metrics and governance — board-ready, and tied to revenue, efficiency and retention.

03

MONTH 3+

Build & Scale

Ship the first quick wins, prove value, then scale toward the flagship Account-Manager Co-Pilot and the unified revenue cockpit.

LET'S BUILD MERIDIAN'S AI-FIRST COMMERCIAL ENGINE

The fastest, lowest-risk next step is a focused discovery sprint. Let's pressure-test these opportunities on your data and turn them into a plan the board can back.



Shiftnode Digital

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About this sample. This document is an anonymized sample AI Growth Audit produced by Shiftnode Digital to illustrate its methodology and deliverable. **Meridian Industrial** is a fictional company; the name, logo, figures, maturity scores, grades and opportunity ratings are illustrative and do not represent any real organization or its actual performance. Competitor names refer to real companies and are used purely for industry context. In a live engagement, every score and impact figure would be developed and validated against the client's own data during a discovery sprint.