



Digital Product Development and Operational Experts

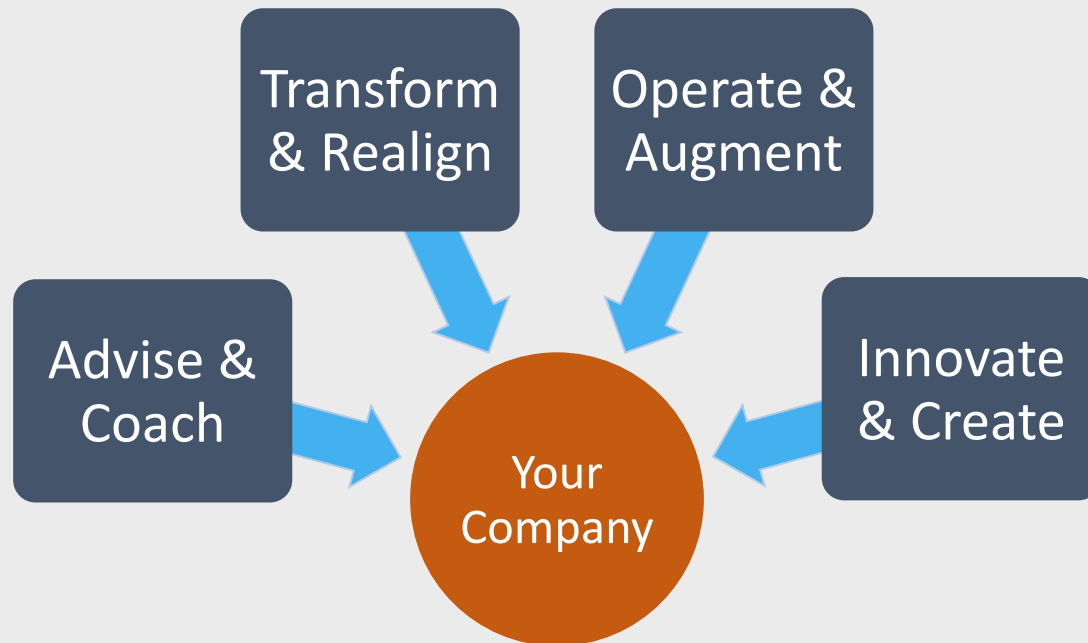
Introduction

Who we are.

- Formed in 2004, We have **experts in Technology, Product Development, Business Operations** and more.
- While primary clients are **Executives, Owners and Investors**, we are often deployed to work with leaders, direct reports and teams.
- Across client list, we have a balance of **New Initiatives, Transformation & Modernization Scenarios and Corrective Action/Project Recovery** situations.
- We are known for being able to **Synthesize, Distill and Position** complex and complicated circumstances into something people understand, make informed decisions and execute.
- Companies we work with are usually in a state of **Fixing, Ramping or Scaling** a product or their entire business.

What We Do

Gaps always exist; we fill them to ensure clients have end-to-end coverage.



- We **share direct operational experience and expertise** to assist your team to deliver solid results.
- We have proven ways to **help safely embrace the opportunistic change** you need to make for your strategic efforts succeed.
- Grappling with gaps in experience and skillsets? We're **able to step in and provide interim/fractional help** or on-board new talent.
- We collaborate with your team to **help define and chart a course** to your North Star.

Hands on Expertise & Competencies

Experience doesn't just appear; either you have done it or you haven't. We have.

Technology
& Product

Operations
& Process

People &
Resources

Budgeting &
Forecasting

Metrics &
Analytics

- All organizations have a similar **set of core “operational organs”**; we have experience in each of them, and how they function together.
- We **align with how your team (stylistically) and organization (culturally) operates** to attack your challenges.
- It is **critical to have balance** across these areas; we can help evaluate and recommend ways to do that.

Common Challenges We Work On (1/2)

We understand their situations, because we have been there; we help solve these.

Client Roles	Common Challenges
CEO	<ul style="list-style-type: none">• Gaps in Executive Team (SVP, EVP, C-level).• Unbalanced strengths, experience or capacity in Leadership team (Director, Sr. Director, VP).
COO, CFO or CIO	<ul style="list-style-type: none">• Operating complexity and need to modernize everything around them has greatly increased; expanding and/or maturing roles of the CMO, CDO, CPO and CTO, which has indirect, but substantial, impact.• Few talk their language; can map back to a mutually respectful and successful operating model.
CMO	<ul style="list-style-type: none">• Have revenue target/number; marketing funnel performance is a must.• Understand brand but need to strengthen team MarketingOps experience.• Mar:tech is still new to operationalize; need support to understand, decide and execute on.
CTO	<ul style="list-style-type: none">• Communication from role is still largely misunderstood (and miscommunicated).• Role missing in many organizations or mislabeled as CIO.• Historically not strong on Budgeting and Resource Strategy (Org).• Hard to build case for core Best Practices, such as Maintenance & Support and Automation.
CPO	<ul style="list-style-type: none">• No longer just define products; must have vision and ability to execute profitable products.• All the responsibility, but often misaligned authority.

Common Challenges We Work On (2/2)

We understand their situations, because we have been there; we help solve these.

Client Role	Common Challenges
CDO	<ul style="list-style-type: none">• Moving from a swarm mentality to stable business unit.• Raising Digital IQ and building Digital Nations has made progress, but still tough.• Often scenarios of 1 step forward, 1.5 step sideways.
CRO/Sales	<ul style="list-style-type: none">• Revenue portfolio has grown in breadth of offerings and depth of complexity.• By the time you operationalize one revenue stream, it's a commodity and you need to move to the next one.• Deep and long operational experience overseeing revenue strategy, ratios, etc. still rare.

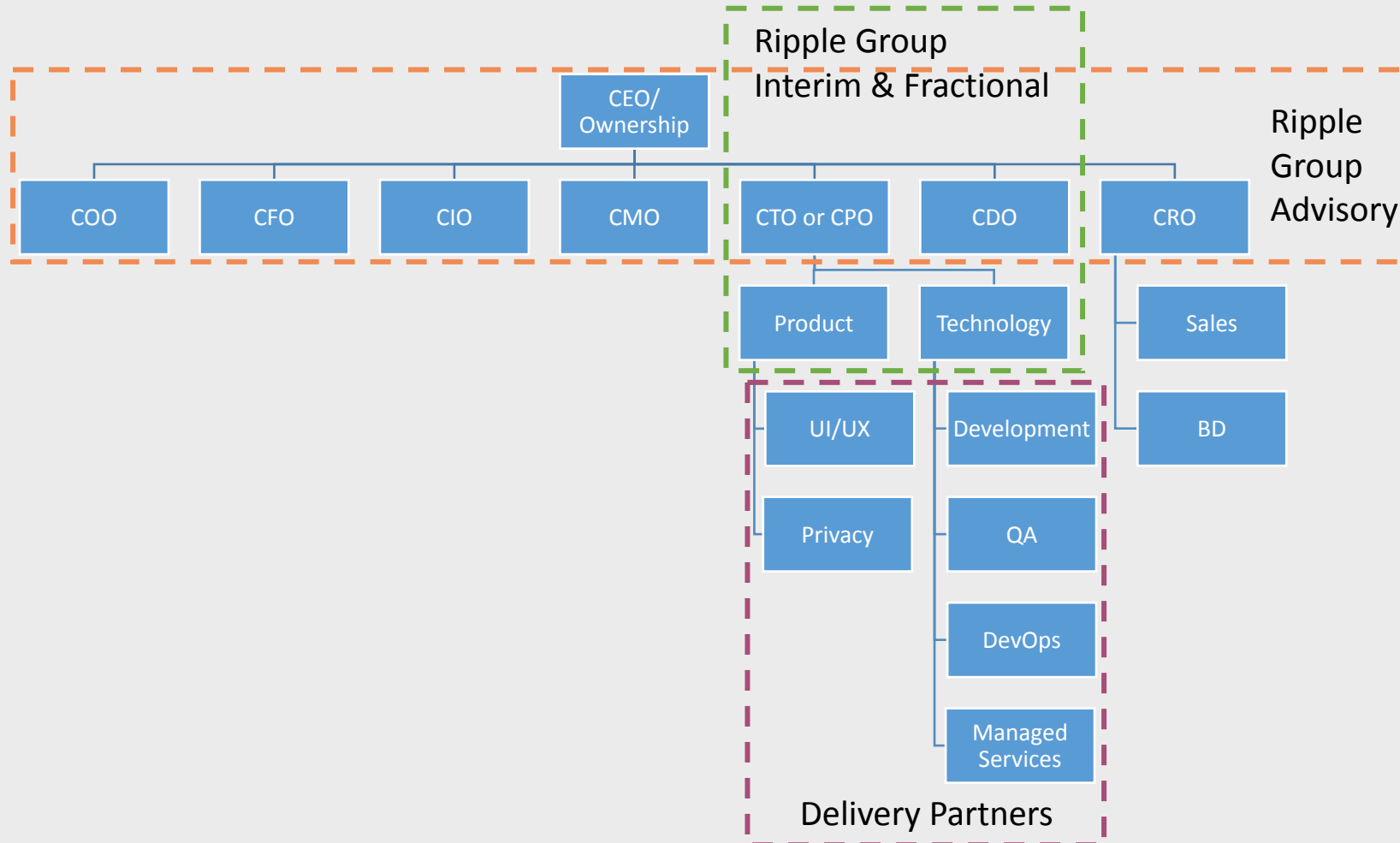
How We Apply Ourselves

We work to achieve seamless integration with your existing team and partners.

- **Assessments & Recommendations:** Equipped with our rich operating experience, we come in to audit your situation and develop a set of recommendations.
- **Strategy & Plans:** we work with you on a strategic approach to attack your goals and create a plan that helps assure success for operations, M&A, and more.
- **Architecture, Roadmaps & Operations:** It's time to get tactical. We deliver clean processes and steps to improve operations.
- **Execution & Advisory:** we can be your team in the cloud, providing interim and fractional or advisory services, while we stabilize your situation and help determine and deliver long-term needs.

Service Mapping

How we map to and support organizations.



Our Runbooks are Our Secret Sauce

We have operationalized our decades of experience into a set of proprietary systems and methods.

Category	Runbooks	Description
All	2	As the “tip of the spear”, these Runbooks allows us to do a thorough inventory, audit and assessment of an entire business, a business unit, team, or any group. The results of applying this Runbook is generally to execute a set of actions, which most often include the installation of our other Runbooks that drive Best Practices.
Staff & Resources	6	Focuses on building proper teams, regardless of departments, including onboarding and internal processes to ensure success. Covers both staff and external resources (vendors and consultants). Rich in Product Development, with some deep coverage in other departments as well.
Finance & Budgeting	4	Covering how to properly build both departmental and company <i>operational</i> budgets that are beyond the typical budgeting exercises.
Products & Services	14	Ultimately, how a company sees the industry they are in, their plan of attack and how they execute. Deep coverage in digital Product Development, with coverage in other areas such as Marketing and Sales.
Processes	13	Processes around on Product Development (technology and digital products); how to maximize the velocity of your engineering teams and product initiatives.
Operations	12	From technology focused monitoring and alerting, to more business focused status reports and corporate dashboards.

52 Runbooks in 6 Categories that can be applied across 9 business areas totaling 323 delivery opportunities.

Clients & Experience

200 companies of all sizes across many industries, technologies and more.



Common Consulting Engagement Methods

These are not set in stone but do reflect how companies generally engage.

Offering	Focus	Minimum Engagement	Deliverable
Fractional & Interim	Staff	1 Month	<ul style="list-style-type: none">• Work With: As defined by Role• Time: As required based on company/role size, responsibilities, etc.• General Focus: As required• Deliverable: As directed by client, but performing duties normally associated with role.• Pricing Model: based on % of industry rate for role.
	Leadership	3 Month	
	Executive	6 Month	
Project-Based	Any	Varies	<ul style="list-style-type: none">• Work With: Designated representative• Time: as required to successfully deliver.• General Focus: Independent workstream that is outsourced for us to deliver.• Deliverable: As agreed.• Pricing Model: Hourly Rate
Advisory	Startup & Early Stage	3 Month	<ul style="list-style-type: none">• Work With: Founder(s), Designated Executive(s) or Leadership Team Members• Time: standing 30-minute call/video chat each week plus as requested (self monitored)• General Focus: formation of company/business unit, building teams, budgeting (revenue, expenses, fund raising, etc.), Technology Architecture and Product Roadmaps, strategic or operational challenges/opportunities, or as agreed.• Deliverable: Provide experience, guidance and direction where they simply do not have the staff to do so.• Pricing Model: Monthly Flat Rate
	Small & Medium Business	6 Month	
	Large Company	1 Year	

Organization & Leadership

Unmatched skills, expertise and experience.

- Broken into Technology, Product Management and Business Operations practices ran by our Principals.
- All have run their own companies.
- All have C-level experience.
- All have startup to large organization experience.