KATIE TOMLINSON BRODER

New York, NY | katie.e.tomlinson@gmail.com | +1 401-749-5655

KEY COMPETENCIES

Leadership | Commercialization | Client Analytics | Customer Relationship Management | Strategic Marketing
Financial Markets | Financial Research | Data-as-a-Product | Data-as-a-Service | Corporate Access | Corporate Events

EXPERIENCE

KTB ADVISORY, New York, NY September 2024 – Present

Founder and Consultant

- Launched an independent advisory firm specializing in strategic growth initiatives for data science, financial services, and investment banking organizations.
    - Developed a framework to identify and prioritize target clients and map internal decision-makers, driving engagement with and acquisition of high-value prospects.
    - Produced high-impact thought leadership and marketing content to showcase expertise and attract interest from target client segments
- Partnered with onboarded clients to architect and execute initiatives advancing strategic objectives through enhanced analytics, content, and client engagement models.

BARCLAYS, New York, NY | London, UK September 2008 – July 2023

Managing Director, Head of Content Monetization, Global Research & Data Science (January 2020 – July 2023)

- Directed global revenue growth strategy for Research and Data Science, overseeing marketing, sales, client strategy, and corporate access.
- Led and unified a 40+ person global team across six disciplines, fostering an environment of collaboration and excellence. Successfully attracted market-leading talent to the firm.
- Mandated global adoption of client analytics to inform customer targeting, product development, marketing initiatives, sales optimization, and corporate event planning.
- Aligned marketing campaigns with core business objectives, leveraging analytics to enhance visibility and generate qualified leads.
- Drove strategy for new product development across data, tools, events, research, and digital platforms, including pricing, target segmentation, and go-to-market planning.
- Orchestrated a global calendar of 1,500+ client events annually, optimizing themes, attendee mix, and ROI.
- Originated digital campaigns for the Institutional Investor survey, the premier evaluation tool for financial market participants, contributing to top firm rankings in a competitive landscape.

Director, Head of Fixed Income Research Product Management (June 2018 – December 2019)

- Pioneered data-driven client servicing models for Fixed Income research, originating sophisticated analytical tools to execute targeted marketing and sales strategies.
- Architected pricing strategy for research and data products in the EU, opening a new line of revenue for the firm.

- Multiplied impact of research reports via integrated marketing campaigns across podcasts, events, social media, and digital advertising.
- Redesigned visual identity of research publications to improve customer experience. Ensured timely dissemination of high-impact reports. Optimized headlines and report abstracts to maximize clicks.
- Led UX design initiatives to strengthen research brand presence on the investment banking website.
- Introduced first-ever B2C marketing approach for Research events.
- Created sales collateral and marketing assets — brochures, data sheets, white papers, infographics, and pitch decks — to support client acquisition and retention.

VP | Assistant VP | Analyst, Fixed Income Product Management (September 2009 – May 2018)

- Selected to collaborate with leadership to launch the firm's first Fixed Income Product Management division.
- Chosen as inaugural European Fixed Income Product Manager, based in London.
- Conceptualized and implemented a CRM system for Fixed Income Research from the ground up.

Research Assistant, Credit Strategy & High Yield Research (September 2008 - September 2009)

- Retained by Barclays following dissolution of Lehman and reductions in force.

LEHMAN BROTHERS, New York, NY May 2007 - August 2008

Research Assistant, Credit Strategy & High Yield Research

- Owned client facing collateral for Head of Credit Strategy and Head of Credit Trading.
- Orchestrated training program for incoming analyst classes.

EDUCATION

UNIVERSITY OF RHODE ISLAND, Kingston, RI

BA, Political Science

- Worked 40-60 hours weekly and traveled countrywide as a competitive gymnastics coach.

QUALIFICATIONS

- Series 7, Series 63, Series 24 (U.S. SEC); Regulations, Securities, Derivatives (U.K. FSA).