KTB ADVISORY STRATEGY LABS

KTB Strategy Labs are facilitated working sessions that define growth strategy through structured ideation, prioritization, and strategic roadmapping.

I focus on driving revenue through data-backed solutions, analytics-informed decision making, and intentional content commercialization

Client Data Foundations

Client information is missing, fragmented, or inconsistent, leaving teams without a trusted source of truth

1

Client Analytics Strategy

Client data exists, but lack of analytics makes it difficult to deliver useful insights

2

Client Strategy Calibration

An outdated analytics framework has weakened focus and broken the link between strategy and execution.
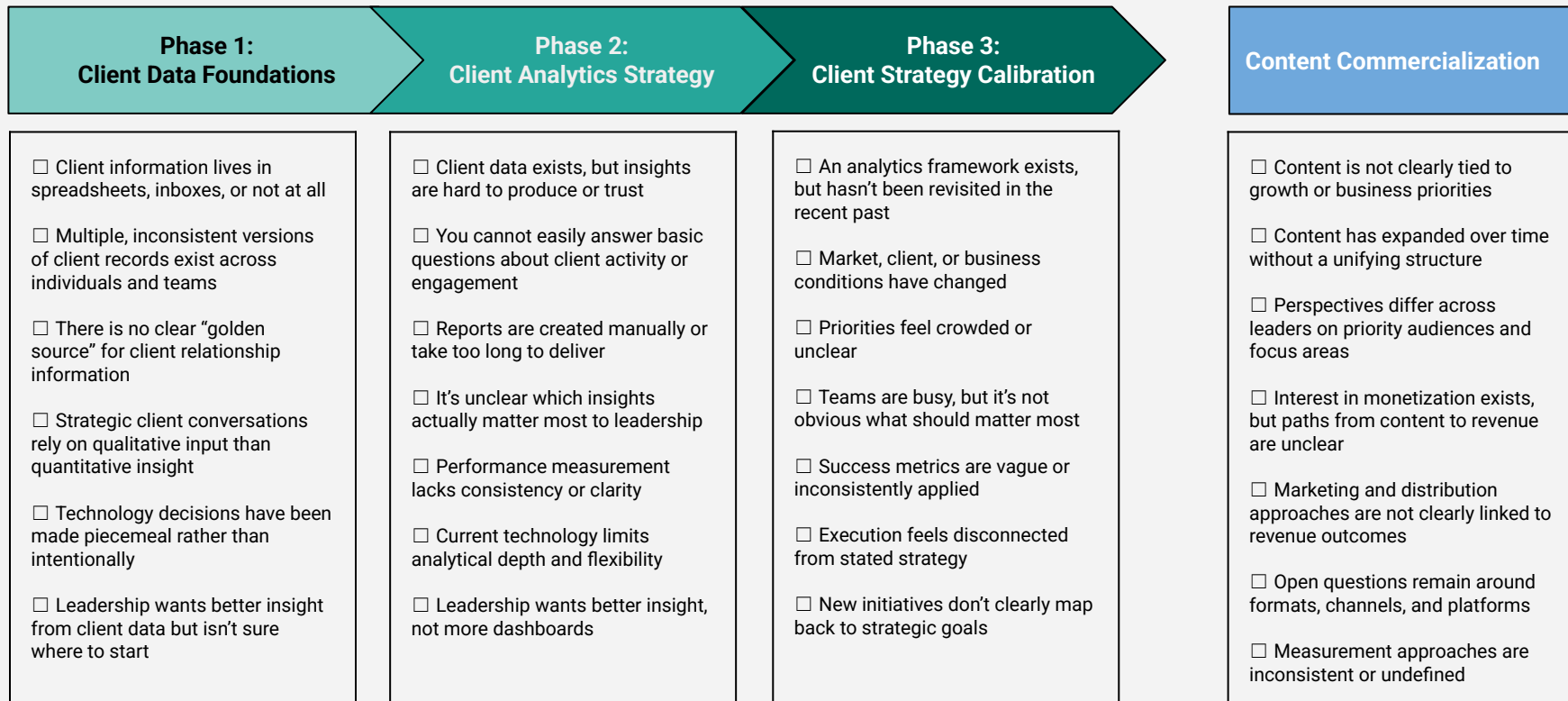
3

Content Commercialization

Content efforts lack a unifying strategy, making it hard to connect audiences, formats, marketing, and revenue.

Which Program is Right for Me?

No matter the phase of the journey you are in, KTB helps you define, prioritize, and execute the next stage of growth.

Phase 1: Client Data Foundations	Phase 2: Client Analytics Strategy	Phase 3: Client Strategy Calibration	Content Commercialization
☐ Client information lives in spreadsheets, inboxes, or not at all	☐ Client data exists, but insights are hard to produce or trust	☐ An analytics framework exists, but hasn't been revisited in the recent past	☐ Content is not clearly tied to growth or business priorities
☐ Multiple, inconsistent versions of client records exist across individuals and teams	☐ You cannot easily answer basic questions about client activity or engagement	☐ Market, client, or business conditions have changed	☐ Content has expanded over time without a unifying structure
☐ There is no clear "golden source" for client relationship information	☐ Reports are created manually or take too long to deliver	☐ Priorities feel crowded or unclear	☐ Perspectives differ across leaders on priority audiences and focus areas
☐ Strategic client conversations rely on qualitative input than quantitative insight	☐ It's unclear which insights actually matter most to leadership	☐ Teams are busy, but it's not obvious what should matter most	☐ Interest in monetization exists, but paths from content to revenue are unclear
☐ Technology decisions have been made piecemeal rather than intentionally	☐ Performance measurement lacks consistency or clarity	☐ Success metrics are vague or inconsistently applied	☐ Marketing and distribution approaches are not clearly linked to revenue outcomes
☐ Leadership wants better insight from client data but isn't sure where to start	☐ Current technology limits analytical depth and flexibility	☐ Execution feels disconnected from stated strategy	☐ Open questions remain around formats, channels, and platforms
	☐ Leadership wants better insight, not more dashboards	☐ New initiatives don't clearly map back to strategic goals	☐ Measurement approaches are inconsistent or undefined

Which Session Format is Right for Me?

I serve as an unbiased, on-site facilitator, bringing ideas and helping teams move past internal politics and competing priorities. I also ensure sessions are productive and action-oriented through thoughtful planning and follow-up.

Assess

Surface challenges, uncover opportunities, and generate a broad set of ideas without filtering

- ½ Day Session
- 3-4 Hours On-Site
- Pre-Session Fact Finding
- Post-Session Action Plan

$5,000

Assess, Decide

Review potential solutions, weigh trade-offs, and make informed decisions to prioritize the initiatives that will have the greatest impact

- Full Day or Two ½ Day Sessions
- 7-8 Hours On-Site
- Pre-Session Fact Finding
- Post-Session Action Plan

$7,500

Assess, Decide, Architect

Translate selected initiatives into a clear, actionable plan, defining design, sequencing, owners, and milestones

- Multi-Day Sessions
- 14-16 Hours On-Site
- Pre-Session Fact Finding
- Post-Session Action Plan

$12,500

Program Details: Client Intelligence

	Phase 1: Client Data Foundation	Phase 2: Client Analytics Strategy	Phase 3: Client Strategy Calibration
Assess	• Define possible client data use cases • Identify what client information is needed to support those uses • Assess gaps between what's needed and what exists today • Review system and technology options to support future needs • Surface risks, concerns, and open questions	• Capture critical client and internal insights currently missing • Identify signals required to improve resource allocation and decision-making • Highlight workflow breakdowns that limit efficiency and impact • Assess limitations of the current data and analytics environment • Evaluate new tools and systems that could close gaps • Surface risks, concerns, and open questions	• Review the current analytics and reporting suite and its real-world usage • Identify areas where strategy is unclear, inconsistent, or under-leveraged • Gather input on metrics to add, refine, or retire • Explore frameworks for evolving the performance measurement strategy • Surface risks, challenges, and open questions
Decide	• Identify the client data and metadata that matter most • Define the master client data and ownership model • Establish responsibility and cadence for data input and maintenance • Prioritize core platforms, systems, and third-party data sources	• Prioritize required insights and decision drivers • Define analytics and reporting to support those insights • Identify additional internal and third-party data requirements • Define how insights should be shared and operationalized • Evaluate options for new workflow optimization tools • Define management KPIs and success metrics • Identify required technology and platform enhancements	• Define which elements of the current strategy to retain, evolve, or retire • Prioritize rollout of new KPIs, metrics, and measurement approaches • Identify technology, process, and platform changes required for execution
Architect	• Define client segmentation and metadata categorization • Design end-to-end client interaction workflows and standards • Define the golden-source data architecture, access, and governance model • Select systems and vendors and define action plans • Develop a roadmap with dependencies and decision points • Ensure a clean handoff to implementation teams	• Design new analytics and reports • Define a plan to source and integrate missing data • Establish performance management KPIs • Outline next steps for platform, data, and technology changes • Develop a sequenced roadmap with key dependencies and decision points • Ensure a clean handoff to implementation teams	• Establish clear ownership and accountability across teams • Design updated metrics, reporting standards, and evaluation toolkits • Develop a sequenced roadmap with key dependencies and decision points • Ensure a clean handoff to implementation teams

Program Details: Content Commercialization

	Content Commercialization
Assess	- Clarify how the firm wants to be perceived through its content - Brainstorm how content could support revenue, given direct and adjacent businesses - Gather list of priority audiences and key client stakeholders - Identify potential sector/product/thematic coverage areas - Surface a broad set of ways to package and deliver content - Inventory available channels used to market and distribute research - Review available technology, platforms, and relevant third-party vendors - Surface risks, concerns, and open questions
Decide	- Prioritize coverage areas - Sequence the paths from content to revenue from straightforward to more complicated - Identify product formats that meet the needs of all key stakeholders and hold a specific purpose - Outline marketing and distribution channels to keep, retire, or add - Identify and prioritize technology and platform options to support content going forward - Define approaches for measuring content engagement
Architect	- Orchestrate rollout of new and updated coverage areas - Finalize the list of product types to be created, including formats and frequencies - Establish sequence of events from content distribution and marketing to revenue-driving activity - Define standards for measuring readership and audience engagement - Determine responsibilities and ownership for content objectives - Identify technology implications and costs - Lay out a sequenced roadmap to guide handoff to the implementation team