

# KATIE TOMLINSON BRODER

## Founder, KTB Advisory

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### KEY COMPETENCIES

Leadership | Strategic Planning | Sales Enablement | Product Development | Client Strategy | Strategic Marketing | Events

### PREVIOUS EXPERIENCE

**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 the revenue growth strategy for the Research and Data Science businesses globally.
- Managed a team of 40+ across six specialties. Led the strategic merger of the six teams, 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.
- Established top-down strategies to align marketing campaigns with core business objectives, leveraging analytics to enhance brand visibility and secure reliable lead generation.
- Informed strategic decisions on new product development, from data science tools and custom projects to market-leading events, published research, and client-facing tech platforms. Drove pricing strategies, identified target buyers, and crafted go-to-market and sales enablement plans.
- Orchestrated an annual pipeline of 1,500+ customer events, focusing on impactful themes and revenue-generating attendee lists, while ensuring seamless execution and strong brand alignment.
- 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)

- Originated the data-driven approach to servicing fixed income clients, building sophisticated tools to monitor client activity and execute targeted marketing and sales strategies.
- Architected the pricing strategy for research and data products in the EU, opening a new line of revenue for the firm.
- Multiplied the impact of research reports through multi-channel marketing campaigns, including podcasts, events, social media, and web-based 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.
- Directed UX design initiatives to amplify engagement and brand presence across the investment banking website.
- Designed and launched B2C marketing approach for Research events for the first time.
- Created comprehensive marketing collateral to showcase departmental strengths to current and prospective clients, including sales brochures, data sheets, product catalogs, white papers, infographics, and pitch decks.

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

- Selected to collaborate with Director to launch the firm's first Fixed Income Product Management division.
- Chosen for the inaugural role of European Fixed Income Product Manager, based in London.
- Conceptualized and built a Research CRM system 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.

**AIM HIGH GYMNASTICS ACADEMY**, East Greenwich, RI

June 2003 – April 2007

#### **Program Director & Competitive Team Coach**

- Coached gymnasts through the HOPES elite level, ran pre-competitive program.

### EDUCATION

**UNIVERSITY OF RHODE ISLAND**, Kingston, RI

**BA, Political Science**, 2005

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

### CERTIFICATIONS & LICENSES

- U.S. Securities & Exchange Commission: Series 7, Series 63, Series 24. U.K Financial Services Authority: Regulations, Securities, Derivatives