

A STRATEGIC FRAMEWORK TO UNLOCK GROWTH, BUILD ENTERPRISE VALUE, AND PREPARE FOR WHAT'S NEXT. DELIVERED AS A MONTHLY FIXED-PRICE ENGAGEMENT OVER 6 OR 12 MONTHS



Strategic Growth & Financial Roadmap

Prioritize growth across markets, products, and channels. Build a financial roadmap tied to strategic initiatives, margin goals, and operational reality. Use clear objectives and key results to align leadership and drive accountability.



Pricing, Profitability & Revenue Optimization

Analyze customer and product/service level profitability, and identify margin improvement opportunities. Execute targeted, data-driven initiatives to optimize revenue streams, support sustainable cash flow, and strengthen enterprise value.



Recurring Revenue & Cross-Sell Strategy

Shift from transactional sales to relationship-based revenue through recurring models and cross-sell strategies. Build predictable cash flow and deepen customer engagement.



Operational Design for Growth

Align people, processes, and technology to reduce owner dependence and support scalable execution. Build foundational infrastructure that empowers teams, streamlines workflows, and enables consistent performance across functions



People Strategy & Leadership Assessment

Evaluate leadership, succession, and cultural alignment to ensure the team can evolve with the business.



Financial Architecture & Performance Management

Design KPIs, build dashboards, and deliver a 3-year investor-grade financial model aligned with strategic goals.



Strategic Positioning & Scalable Growth Pathways

Develop a clear growth strategy and financial trajectory to support sale, next-stage investment, or long-term value creation.