

trepwise™

is an impact consulting firm

that works to build capacity for organizations and individuals. Whether it is an early stage venture searching for practical solutions to the challenges of growth or a more established organization looking to adopt innovative and entrepreneurial approaches, our team of advisors is here to help clients define and achieve impact. Working with hundreds of organizations across the for-profit, non-profit, and public sectors, and supporting accelerator programs globally, our diverse experience helps us tackle any problem our clients encounter. Our goal is to work alongside clients to plan, strategize, and implement with a focus on sustainable empowerment.

At **trepwise**, we envision a world of thriving cities, with entrepreneurial thinking as a driver of equitable economic development. We are building that world through impact, one organization at a time.

Impact Consulting

Our approach is grounded in objective research and practical experience. At **trepwise**, we leverage innovative thinking to guide organizations along their desired trajectory. We not only provide tools and plans for action, but we also coach our clients in the skills and confidence necessary to lead successful organizations.

- We recognize the diverse and unique needs of each organization and work with them to define their impact, build a roadmap, and implement their vision for the future.
- We work with a variety of clients, from early-stage entrepreneurs focused on go-to-market strategies to long-established institutions interested in infusing entrepreneurial thinking across their organization. What all clients share is significant potential and the need for a partner to support their trajectory.
- We are dedicated to bringing measurable and sustainable impact to client operations, and we work tirelessly to balance long-term strategic thinking with implementation support to move the needle.

"**trepwise** is an amazing resource for an entrepreneur. I can't say enough about what Kevin and his team have done for our business!"

- *Billy Bosch*

Founder of Be Well Nutrition, makers of Iconic Protein Drink



AREAS OF EXPERTISE

- Board Development
- Branding & Marketing
- Executive Coaching
- Facilitation
- Financial Management & Fund Development
- Operations
- Organizational Culture
- Sales
- Strategic Planning

Board Development

For organizations seeking to maximize impact and ensure long-term sustainability, few things are as important as an engaged board with a diverse skillset that can advance organizational goals. Whether you are in need of a hands-on working board or a more strategic governing board, **trepwise** has the experience and resources to curate, develop, and manage the Board of Directors that will best serve your organization.

While the process will be tailored to fit your needs, **trepwise's** approach to **Board Development** follows the framework outlined below:

I. Needs Assessment

II. Structure & Development

III. Functionality & Protocols

I. Outlining vision and goals, assessing the current situation, & mapping out the path to success.

- Organizational assessment - key stakeholder interviews, themes, and scorecard
- Current needs and opportunities assessment
- Ideal Board composition and framework development - tenure, gender, age, and skillsets
- Current and potential Board member assessment and evaluation

II. Helping your organization develop the most appropriate and effective Board.

- Recruitment pitch - requirements for joining the Board and reasons to participate
- Recruitment and vetting of new members
- Visioning and retreat facilitation
- Strategic planning oversight
- Succession planning
- Logic model development

III. Guiding development of the Board of Directors & advising implementation of best practices.

- Priority and goal setting - working metrics around implementation
- Bylaw and policy assessment
- Agenda and meeting structure frameworks
- Communication protocols
- Technology and efficiency tools
- Impact metric development and capture methods
- Decision making frameworks
- Leadership coaching and development
- Performance management systems