

# trepwise<sup>TM</sup>

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 diversity of 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 empowerment and longevity.

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 which we apply to guide organizations along their desired trajectory. The goal is not only to provide tools and plans for action, but to also coach our clients in the skills and confidence necessary to lead successful organizations. Whether you are developing a strategic plan or bringing a product to market, **trepwise** was built to help you achieve your goals.

- 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.
- Our engagements vary 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

# ... to build thriving, equitable cities

Our firm is rooted in the belief that the key to a thriving city is inclusive innovation and organizational capacity building. The hope is that through our support of existing enterprises and institutions across a variety of industries, the local economy will become increasingly robust and resilient. At the same time, we believe passionately in new ideas, and we directly support entrepreneurs seeking to use market disruption to create more inclusive and equitable economies. Through enhancing the capacity of our clients to provide new and valuable services, we seek to improve quality of life in the communities where they exist. And by forming partnerships with a diverse client base across the urban economy we aim to achieve collective impact through entrepreneurial thinking.



## OUR SCOPING PROCESS

1. Each engagement begins with an in-depth scoping session driven by a needs-based approach in order to understand the client's current situation and challenges they are facing.
2. **trepwise** provides a detailed summary and outlines a recommended scope for the engagement tailored to each organization's available resources. Scopes include: measurable objectives, process deliverables, and a timeline for the engagement.
3. Proposed scopes are reviewed with prospective client to gain alignment around priorities.

## Services

Our team of advisors can support a wide range of business needs, tailored to your current goals and challenges. We provide the following services as an extension to your current capabilities and resources:

### Board Development

- Board Assessment
- Board Evolution
- Network Development

### Branding & Marketing

- Value Proposition
- Brand Concept & Personality
- Marketing Plan

### Executive Coaching

- Leadership Development
- Pitch Prep
- Predictive Index Assessment

### Facilitation

- Board Retreats
- Staff Retreats
- Organizational Cohorts

### Finance & Fund Development

- Financial Modeling
- Budgeting & Forecasting
- Earned Income Strategies

### Operations

- Organizational Design
- Supply Chain Management
- Process Mapping

### Organizational Culture

- Mission, Vision, and Values
- Performance Management
- Communications Audit

### Sales

- Sales Process & Analysis
- Buyer's Journey
- Customer Segmentation

### Strategic Planning

- Stakeholder Interviews
- Facilitated Board Meetings
- Iterative Writing