

The Learning Plan

Case Study



From scattered to scaled: building the marketing, product, and team infrastructure of a growing technology company

INDUSTRY Technology / SaaS	DURATION 4+ years	ENGAGEMENT Embedded Fractional
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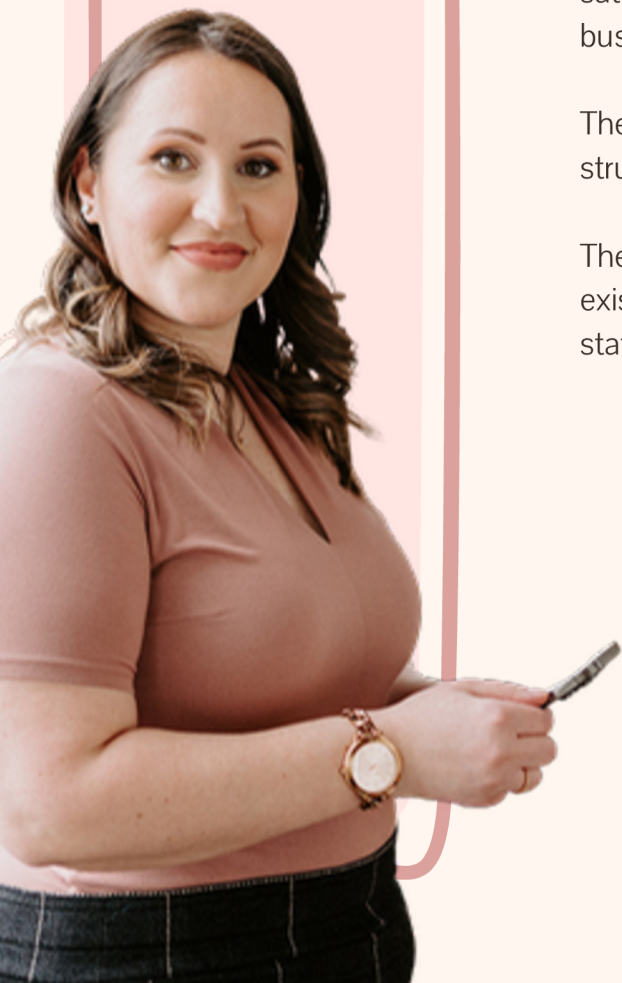
The Situation

A growing technology company had momentum but no infrastructure behind it.

Marketing was reactive and undocumented. Product management sat with the CEO — unfocused, disconnected from the day-to-day business, and spread too thin to drive real outcomes.

The service team was expanding, but without the processes, tools, or structure to support the growth cleanly.

The company needed senior operators who could build what didn't exist, own what the CEO could no longer carry, and hand it over in a state that would last.



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The Work

PHASE 1 - MARKETING FOUNDATION

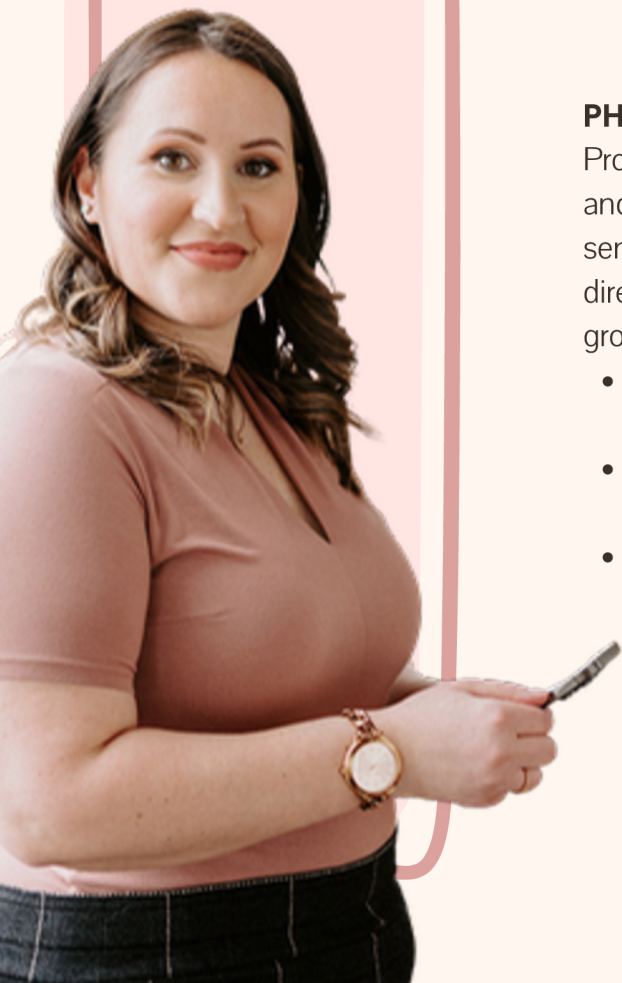
Joined as the second marketing hire. Built the foundational framework from near-zero: brand framework, process documentation, content systems, and the organizational scaffolding needed to grow the function.

- Established repeatable marketing processes and documented them for team use
- Built and expanded the marketing team to support growth stage demands
- Transitioned the function to a sustainable, self-sufficient state before moving to the next challenge

PHASE 2 - PRODUCT MANAGEMENT OVERHAUL

Product management was owned by the CEO but was unfocused and disconnected from actual service delivery. Stepped in as a senior product manager with a dedicated portfolio, partnering directly with the service director to redesign the offering from the ground up.

- Overhauled the product portfolio in partnership with the service director
- Redesigned the service offering to be simpler, more distinct, and easier to sell
- Connected product decisions directly to business operations and revenue outcomes



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The Work, continued

PHASE 3 – TEAM RESTRUCTURE AND LEADERSHIP INFRASTRUCTURE

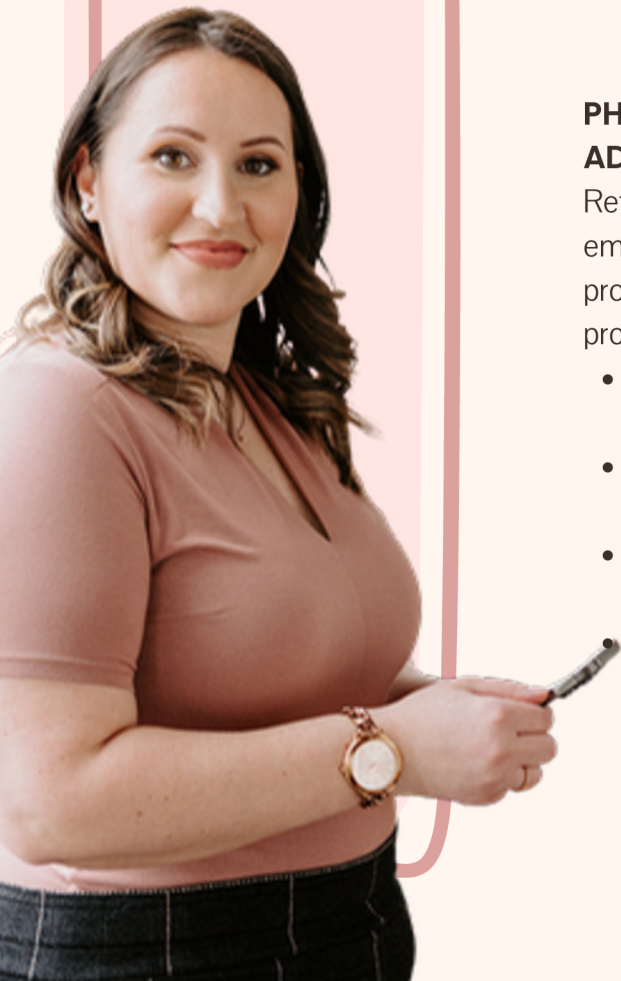
Led a full re-org of the product team. Built the organizational and operational infrastructure the team had never had, then handed it over to new leadership before taking a planned leave of absence.

- Hired, promoted, and trained team members through the restructure
- Created the company's first formal budget and 12-month product roadmap
- Built documentation and frameworks designed to survive the transition

PHASE 4 – SERVICE TEAM ENABLEMENT AND CRM ADOPTION

Returned from leave and shifted focus to the service team — embedding directly into their operations to drive CRM adoption, process maturity, and leadership development for their newly promoted managers.

- Drove full CRM adoption across the service team, including API integration between the CRM and existing ERP
- Built surrounding process documentation and team usage frameworks
- Mentored new-to-management leaders through a politically complex environment
- Developed tools for leaders to evaluate, hire, promote, and manage team members consistently



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The Outcome

4x service revenue growth	4+ years of embedded engagement	3 distinct functions build or overhauled
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“ Industry peers and competitors have noted the simplicity and distinctiveness of the service offering — a direct result of the product redesign work. ”

The company entered the engagement with a CEO carrying too much, a marketing function that didn't exist in any structured form, and a product team operating without direction or infrastructure.

It exited with a mature marketing function, a service product portfolio that had contributed to quadrupled revenue, a fully restructured team with its first formal budget and roadmap, and multiple teams running a CRM that actually stuck.

Disciplines: Marketing Leadership | Product Management | Organizational Design | Change Management | Team Leadership | CRM Implementation

