Data & AI strategy.

Turning a fragmented data estate into a compounding advantage.

A representative engagement — how I frame data & AI strategy for an executive team, from diagnosis through a measurable roadmap.

DIAGNOSE
POSITION
SEQUENCE
MEASURE

01 · THE SITUATION

Strong product, growing fast — decisions still run on instinct.

A mid-stage connected-health company — roughly $40M in recurring revenue, scaling from 30 to 100+ enterprise accounts. The product works. The data doesn't yet earn its keep.

Fragmented

Numbers live in a dozen tools; no two teams define a metric the same way.

No shared truth

Leadership steers growth and retention off spreadsheets no one fully trusts.

Metrics ≠ decisions

Dashboards report what happened; none of them draw the conclusion.

> **The real question isn't "what dashboards do we need?" It's where durable advantage comes from — and how you compound it.**

A decision system, not a slide library.

Four moves, in order. Each one narrows the next, so effort compounds instead of scattering across a dozen frameworks used shallowly.

1

Diagnose

Where does margin pool, and what shape is the data estate in — really?

›

2

Position

Isolate the one asset that's a genuine moat; change the basis of competition.

›

3

Sequence

Stage the bets as options; pressure-test against divergent futures.

›

4

Measure

Wire the strategy to a small set of KPIs traceable back to source events.

Read where the margin actually pools.

Profit collects where power is scarce along the value chain. Before touching a roadmap, map the pressures — and quantify each with the client's own data, not a generic scorecard.

ENTRY

AI-native entrants rebuilding the workflow with none of the legacy cost.

BUYERS

Payers & providers consolidating — fewer, larger, more demanding accounts.

SUPPLIERS

Cloud & data vendors capturing a rising share of every transaction.

SUBSTITUTES

In-house builds and point tools nibbling at the edges of the platform.

RIVALRY

Feature parity racing toward zero — everyone ships the same dashboard.

> **Four of five pressures point the same way: feature competition is a dead end. The advantage has to come from somewhere structural.**

Audit the data estate like a balance sheet.

You can't position on an asset you haven't inventoried. Every source gets scored on five dimensions — the same way you'd assess any asset you intend to build advantage on.

Coverage	Which decisions does each source actually inform?
Quality	Trustworthy enough to bet the quarter on?
Ownership	Who is accountable when it drifts?
Lineage	Can any number be traced back to its source event?
Re-derivability	Raw payloads kept, so metrics can be rebuilt?

12+

Disconnected systems feeding today's reporting

1

Shared source of truth in place today — the gap to close

0

Metrics currently traceable end-to-end to a source event

Not every dataset is an asset.

Run each candidate through four gates. Only what clears all four is a moat worth building the strategy around — everything else is table stakes to run efficiently, not to bet on.

Valuable	Rare	Hard to copy	Hard to replace
Moves a decision that moves the P&L	Competitors don't hold it	Costly or slow to reproduce	No cheap substitute achieves the same
✓	✓	✓	✓

> **Here, one asset clears every gate: the proprietary longitudinal outcomes data — years of it, tied to real results, that no entrant can buy or rebuild quickly. That's where the strategy anchors.**

Stop competing feature-for-feature. Redraw the curve.

With the moat identified, change what the market competes on. Dial down what the category over-serves; dial up what only the proprietary data makes possible.

DIAL DOWN

Feature volume

Stop matching every competitor checkbox; it's a race no one wins.

DIAL DOWN

Custom reporting

Reduce bespoke dashboards that don't compound across accounts.

DIAL UP

Outcome proof

Lead with evidence rivals can't show, drawn from the outcomes data.

CREATE

A shared index

A proprietary measure that becomes the market's language for value.

The created move is the one that matters: a defensible index built on the moat becomes the yardstick buyers use — and the thing competitors have to react to.

Treat big bets as options, not obligations.

The roadmap can't assume one future. Structure each major investment as a small, reversible commitment that buys the right — not the obligation — to scale once uncertainty resolves.

Stage the investment

Probe	Small build; define the metric that would justify scaling.
Trigger	A pre-agreed threshold converts the option to a commitment.
Scale or stop	Double down when the signal clears; walk away cheaply when it doesn't.

Pressure-test against futures

Payer-led	Buying power concentrates around cost & outcomes.
Provider-led	Workflow integration becomes the deciding factor.
Consumer-led	Engagement & experience drive the market.

The moat holds up in all three — which is why it's the right anchor.

Strategy you can measure.

A strategy that can't be measured can't be steered. Translate it into a small, balanced set of indicators — each specific, owned, time-bound, and traceable to a source event.

FINANCIAL

Net revenue retention · gross margin per account · cost-to-serve.

CUSTOMER

Outcome index movement · renewal likelihood · expansion signal.

PROCESS

Time-to-decision · data quality & coverage · pipeline reliability.

LEARNING

Options resolved per quarter · model & capability build-out.

> **Every indicator answers one test: does it change a decision? If moving the number wouldn't change what we do, it's not on the board.**

Ninety days to a compounding advantage.

Diagnose & align — DAYS 0–30	Position & prioritize — DAYS 30–60	Instrument & execute — DAYS 60–90

Diagnose & align · DAYS 0–30

Establish the truth

- Inventory & score the data estate
- Broker one shared metric definition
- Quantify where margin pools

Position & prioritize · DAYS 30–60

Find the moat

- Run assets through the four gates
- Design the proprietary index
- Frame bets as staged options

Instrument & execute · DAYS 60–90

Make it measurable

- Stand up the balanced KPI set
- Wire metrics to source lineage
- Ship the first option's probe

Depth over breadth: one moat, one index, one measurement spine — built to compound, not a laundry list of initiatives that stall by month two.

08 · THE OUTCOME

From fragmented data to a decision engine.

Before	After
A dozen tools, no shared truth	One governed source of truth
Dashboards that report, never conclude	A proprietary index rivals must react to
Roadmap betting on a single future	Bets staged as options, tested across futures
Competing on features, margin eroding	A measurement spine leadership steers by

> **The thesis in one line: proprietary data + clear decision logic + disciplined sequencing → a durable, measurable advantage.**

THE TRANSFERABLE THESIS

Same operating system, any strategic question.

Diagnose where value pools · Isolate the durable advantage · Sequence the bets · Make it measurable

The frameworks are just discipline. What turns them into advantage is anchoring every move to real data — and to the one question that matters: does this change a decision?

Built to be executed, not filed.

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