



# MAX'S KNOWLEDGE PRODUCT ROADMAP™

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Helping agencies productize  
consulting services.

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**MAX  
TRAYLOR**  
KNOWLEDGE  
IS PRICELESS

## TIME TO STEP OFF THE HAMSTER WHEEL

The “done for you” model trades time for dollars: each incremental dollar earned comes at an increased cost of complexity and profitability.

Working harder to make your “done for you” model grow will only make the pain worse.

The solution, a more predictable and scalable business model, is right under your nose.

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**“Max is helping me build a fast-growing, wildly profitable, scalable business that can thrive without me by helping me turn my knowledge into a product and a predictable, recurring revenue stream.”**

-Dr. Roxie Mooney, Commercialization Strategy for Healthcare Innovators

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## WHY MAX'S KNOWLEDGE PRODUCT ROADMAP?

Max has the structure, experience, network and vision to turn intangible expertise into a knowledge product that will 10x your business and personal productivity.

Max's motivation is to help you spend more time doing what you enjoy, while contributing to more clients and making more money than you ever have before... in that order.

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# WHAT'S INCLUDED?

**Max: Your thinking partner, strategist and product producer.**

Weekly video calls with Max: a mix of coaching, consulting and collaborative product creation.

**Katrina Busselle: Your innovation manager**

Ensures accountability on both sides. Collects, organizes and processes feedback during pilot phase.

Resource	How is it used?
<b>Position &amp; Messaging</b>	Identify ideal client and set expectations for paid pilot engagement.
<b>Standard Operating Procedure</b>	Create a consistent experience for the strategist and client.
<b>Sales &amp; Product Templates</b>	Improve efficiency and value of sales process, client workshops and delivery of strategy product.
<b>Knowledge Product Roadmap™</b>	Strategists can easily access all sales and product resources and adopt habits to improve the product through documented strategist and customer experiences.

***"Max has a unique ability to identify expertise. He harnesses that expertise into strategy products that are easy to sell."***

*Daniel Latzman, Customer Journey Blueprint™*

# DELIVERABLES

Resource	How is it used?
<b>Product Master</b>	Used as the SOURCE for product messaging, templates and Standard Operating Procedure.
<b>Sales Proposal Template</b>	Set client expectations with defined strategic deliverables, work process and fees. (3-5 page proposal)
<b>Program Guide Template</b>	Manages client expectations throughout the consulting process. (20-50 slides)
<b>Strategy Deliverable Template</b>	Deliver education, tailored resources and action plans to clients. (10-30 pages which link out to individual resources).
<b>Unique Tools</b>	Deliver specific client recommendations & action plans. These tools are unique to your IP, methods and process and are TBD during our product development workshops.
<b>Explainer Videos</b>	Training for internal team members on how to use the resources above.

# WORK PROCESS

Stage	Objective	Format	Date
<b>Quarter 1 Gameplan</b>	Determine critical initiatives, goals, team roles and a timeline of activity.	30 minute video call with documented gameplan.	Day 1
<b>IP Audit</b>	Organize existing resources, use cases and identify gaps.	Max reviews ALL existing client resources and prepares his “asset plan” spreadsheet.	Day 1
<b>Product Workshop</b>	Determine ideal pilot client & collaborate on key messaging & scope of work.	3 hour virtual workshop between Max & Innovator	Day 2
<b>Proposal Creation</b>	Create re-usable document which sets expectations for deliverables and work process.	4-5 page slide deck (PDF)	Day 4
<b>Pilot Support</b> (development of resources on previous page).	Ensure pilot engagement is secured and all product resources are created to support future engagements.	Weekly 60 minute virtual meetings with max, collaborative resource production, and accountability from Katrina.	Starting week 2
<b>Pilot De-Brief</b>	Identify biggest challenges & opportunities for improvement using Experience Journal entries from pilot engagement.	60 minute review of Experience Journal & prioritized product improvements.	End of Pilot
<b>Knowledge Product Roadmap™</b>	Make all product resources easily accessible by product managers & promote regular product improvements.	10 page Google Slides Document (PDF) with links all product resources and tasks.	Day 90

# ENGAGEMENT FEES

Stage	What's included	Fees
<b>Knowledge Product Roadmap™</b>	Q1 work process as defined on the previous page. Includes product development, pilot support and final deliverable.	\$20,000
<b>Quarterly Gameplan Workshop</b>	Review of experience journal, workshop facilitation & Gameplan deliverable.	\$5,000 per quarter.
<b>Future Considerations</b>		
<b>Strategy Team Enablement</b>	Development of certification & licencing program for strategists.  <i>NOTE: Scope and pricing varies based on size of team and complexity of offerings.</i>	Starting at \$50,000
<b>Innovation Manager Development</b>	Job role development, management of evaluation and hiring process, training and onboarding.	\$15,000
<b>Sales &amp; Marketing Engine</b>	Development of demand generation, sales and marketing process to fill the pipeline with ideal buyers.  <i>NOTE: Ongoing fees for implementation of demand gen programs are separate.</i>	\$15,000