

# CHIEF STRATEGY OFFICER (CSO)

## COMPANY OVERVIEW

Hasta Advisors, LLC is a federally and NY State certified Service-Disabled Veteran-Owned Small Business (SDVOSB) delivering strategic advisory, construction management, compliance, and facilitative project delivery services. As your Fractional Chief Strategy Officer, I deliver executive-level leadership that drives growth by aligning business development, operations, and financial performance. My role is to help your construction company win more, scale smarter, and position itself for long-term market leadership without the overhead of a full-time CSO.

A Fractional Chief Strategy Officer provides executive-level leadership without the full-time overhead. By embedding directly into your leadership team, the Fractional CSO helps align growth strategy, business development, operations, and financial discipline to position your construction company for scalable, sustainable success.

## VALUE TO THE COMPANY

- **Executive Strategy Without Full-Time Overhead** – Access the expertise of a C-suite leader at a fraction of the cost.
- **Construction-Specific Insight** – Deep knowledge of public procurement, design-build, CM/Owner's Rep, and capital programs.
- **Alignment Across the Business** – Ensures BD, estimating, operations, and finance work toward the same goals.
- **Scalable Growth** – Builds systems, processes, and leadership capabilities that allow the company to expand sustainably.

## SCOPES OF SERVICES

### Strategic Growth & Market Positioning

- Develop long-term strategic growth roadmaps (90-day, 1-year, 3-year).
- Conduct market research, industry trend analysis, and competitor benchmarking.
- Define new market entry strategies, niche positioning, and service diversification.
- Align company mission, vision, and values with business expansion goals.

### Business Development & Marketing Leadership

- Oversee business development and marketing integration at the executive level.
- Implement and govern CRM systems and pursuit tracking dashboards.
- Establish bid/no-bid frameworks to improve proposal ROI and hit rates.
- Drive pre-positioning strategies with agencies, developers, and institutions.
- Ensure brand presence and reputation align with growth objectives.

### Client & Partnership Development

- Represent the company with agency executives, institutional clients, and private developers.
- Build strategic partnerships with architects, engineers, and specialty consultants.
- Formalize key account management and client retention programs.
- Develop referral and relationship frameworks to generate repeat opportunities.

## SCOPES OF SERVICES (CONT.)

### Leadership & Organizational Development

- Mentor executive leadership and senior managers.
- Support recruiting, succession planning, and team structure for growth.
- Provide leadership training across BD, estimating, and project teams.
- Foster a culture of accountability, collaboration, and innovation.

### Reporting & Performance Metrics

- Provide quarterly strategy reviews with leadership and ownership.
- Deliver integrated dashboards for pipeline, revenue forecasting, and operational KPIs.
- Track and report on pursuit success rates, market penetration, and strategic growth milestones.
- Adjust strategies in real-time to ensure alignment with business goals.

## PROPOSAL & PURSUIT DEVELOPMENT OVERSIGHT

### RFP Scoping Leadership

- Define pursuit strategy before release (client intel, teaming, differentiators).
- Review draft solicitations and identify alignment gaps or red flags.
- Evaluate scope fit with company capabilities and financial targets.
- Determine bid/no-bid decisions based on margin, risk, and strategic value.

### Prepositioning

- Oversee market intelligence, early engagement, and client alignment.
- Direct BD staff or estimators in developing preliminary work plans or budgets.

### Response Strategy & Content Leadership

- Define win themes, key differentiators, and client value proposition.
- Align technical content with strategic messaging and company goals.
- Ensure responses articulate operational excellence and compliance clarity.

### Final Review & Submission

- Oversee executive summary, project understanding, and quality assurance.
- Provide final go/no-go review and executive signoff on submission.

## ENGAGEMENT OPTIONS

### Flat Monthly Retainer (most common)

- *Pros: Predictable cost for the client.*
- *Cons: Requires a tight scope definition to avoid scope creep.*

### Hourly/Daily Rate (estimate provided at the time of engagement)

- *Pros: Easy to start, no long-term commitment.*
- *Cons: Transactional in form; not ideal for ongoing executive positioning.*

### Tiered Packaging (monthly fee)

**Growth Package** - 10-15 days/month, leadership coaching, BD oversight

**Enterprise Package** - 20-25 days/month, full executive integration, pipeline reporting

- *Pros: Clear options for clients, easier sales conversation.*
- *Cons: Requires a strict definition of what's "in" each tier.*

### Performance Linked/Hybrid (monthly retainer + performance bonus)

- *Pros: Aligns incentives with client success.*
- *Cons: Requires clear tracking and agreement on attribution.*

