

From Zero Pipeline To a Repeatable Flow of Fundable Ideas And a Revenue-Generating Venture

With Allie Carey, Chief Strategy Officer, SEI Private Banking and Wealth Management

Allie was tasked to grow beyond the core by leveraging existing assets, client relationships, and domain expertise. Instead of treating "innovation" as ad-hoc activity, she installed a system:

Idea sourcing → coached shaping → exec selection → time-boxed experiments → go/no-go and commercialization.

In practice, this moved the org from no visible pipeline to ~3 real experiments per year, with one venture launched and paying customers. The mindset shift was key: not "fail fast," but learn quickly where to invest, making smaller, risk-adjusted decisions faster.

The 5-Step Playbook (what to do and why it works)

1) Set the Growth Gap & Right-to-Win Thesis (Weeks 0–4)

Start by quantifying the gap between core trajectory and leadership's growth target. Then state where you have a right to win, ie: the assets you can uniquely leverage (distribution, data, trust, technology, brand). Turn that into 2–4 clear theses for Horizon 2/3 (e.g., "We can serve X new segment using Y asset"). This gives people direction so they're not "innovating into a void."

Sponsor = CEO/BU head.

Owner = Strategy lead who writes it down and socializes it.

2) Align the Organization (Months 1–6, then ongoing)

Communicate the theses in plain language, and be explicit about risk appetite (financial, opportunity-cost, regulatory). Invite contributions without heavy process, and keep the core close. Experts from the core are essential for new-venture truth-telling. Assume alignment decays; refresh it whenever market, regulation, or priorities shift.

3) Source & Shape Ideas (6-week window; repeat)

Open a company-wide call for ideas in two tracks: Efficiency (\geq \$250k savings in 12 months) and Growth (\geq \$1M revenue in 12 months). Require a one-page business plan (problem worth solving, customer, evidence so far, asset leverage, feasibility, 12-month outcome). Run 2–3 coaching clinics so entrants know what “good” looks like; invite past winners to mentor. End with 7-minute pitches to an executive panel using a simple rubric: desirability, innovation, feasibility (can it stand up in ~12 months), and commercial viability. Expect something like 30 submissions → 10 pitches → 1–2 winners, with additional promising ideas “parked” or queued for later exploration.

4) Time-boxed Experimentation (\approx 6 months)

Form a small cross-functional team (the idea originators may advise but aren’t always the executors). Embed a neutral coach from Strategy to keep the work evidence-based and to counteract “pride of ownership.” Define milestones up front (customer signals, MVP definition, technical feasibility, risk/legal path, early pre-sell). Meet monthly with a lightweight steering committee of execs to clear blockers and make go/slow/stop calls. Treat the funnel as living. You can admit non-contest ideas here if they fit the theses.

5) Go / No-Go & Commercialize (timing varies)

Green-light when you’ve accumulated enough evidence: buyers are engaged, delivery is feasible, you’re leveraging genuine assets, and risks are bounded. Decide where it lives; integrated into the core operating model or run adjacent as a distinct offer. Convert the evidence pack into a funding ask tied to MVP + first releases and bring Sales/Onboarding into the run-state. In the case that inspired this playbook, the team reached first paying customer ~6 months after the go decision.

Metrics that Matter (plus a simple Kill Sheet)

Leading (weekly/monthly to prove you’re on track):

Participation and qualified submissions; time-to-decision at each gate; number/quality of customer signals (interviews, pilots, LOIs); pre-sell progress (first meetings → commitments).

Lagging (quarterly, prove it matters):

Experiments started/year (target ~3); efficiency wins integrated back into core; new-business revenue and pipeline; time from go decision to first paying customer.

Kill Sheet defaults (tune to context):

- Scale if you hit the customer-signal target and feasibility/risk milestones two reviews in a row.
- Iterate if signals are partial or risks are solvable within one cycle.
- Stop/Park if below the signal floor by Month 3 or a red-line risk appears. Capture learnings and feed the core roadmap.

Common Traps → Practical Countermeasures

- **Committee creep** → Cap the review council at three; fixed agenda; decisions time-boxed.
- **Idea theater (no evidence)** → One-page plan + coached prep + a hard 7-minute pitch limit.
- **Wrong team executes** → Re-staff after selection; keep ideators as advisors.
- **Governance stalls** → Pre-agree guardrails; pull Legal/Risk in at Milestone 0 with a checklist.
- **Orphaned wins** → Decide early: integrate into core vs. run adjacent; engage Sales well before go-no-go.

Start in 30 Days

(starter plan you can copy)

- **Week 1:** Publish growth gap + right-to-win theses; name sponsor and owner; share the calendar of clinics and pitch day.
- **Week 2:** Release the one-page template and judging rubric; hold Clinic #1 (“what good looks like”).
- **Week 3–4:** Open submissions; hold Clinic #2 (office hours). Recruit judges; book pitch slots.
- **Week 5–6:** Shortlist and coach; run pitch day; select winners and a small “also-run” portfolio.
- **Week 7–12:** Launch experiments with monthly steering and pre-defined milestones; publish a one-slide progress dashboard.

Why This Works

It marries clarity of direction (theses and guardrails) with evidence-driven action (time-boxed experiments, pre-sell), and it shrinks decisions to risk-adjusted increments the business can stomach. **The outcome isn’t just a launch or two...it’s an engine that repeatedly turns enterprise assets into new growth.**

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live-playbook
build

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