



Annual Report

2025

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Letter from Andi Baldwin, PIE's CEO



2025 was a very full year at PIE in all the right ways. After our first-ever down year in 2024, we quickly got back on a growth path in 2025 to end the year strong, with expanding relationships across our key client base.

We saw two big disruptors across our industry continue to build momentum in 2025: AI and Private Equity (PE) investment. As nearly every industry began to accelerate adoption of AI, so too did professional services. Internally, our clients are focused on using AI to drive efficiency and are beginning to rethink their own delivery and pricing models. Many of our accounts also invested in client advisory boards and feedback programs focused around AI, ensuring that client voice stays at the center of their AI strategies. Consulting firms also continued to be key advisors to their clients who were trying to build and deploy AI strategies and are in need of trusted expertise. Of the more than 400 executive roundtables PIE facilitated in 2025, I'd be hard-pressed to find a single one that didn't have some mention of AI on the member-created agenda.

The presence of PE in professional services continued to gain steam in 2025 as well, driving further consolidation in industries like accounting and engineering. This has forced services firms to think about growth in new and different ways – with some hiring their first 'Chief Growth Officer' roles, and many having to invest more heavily in training and development around cross-selling to ensure they are hitting their desired growth targets from M&A investments. PIE's publication of *The Growth Engine* was timely in setting us up to help our clients with these exact challenges. From what we've seen at the start of 2026, neither of these trends show any signs of slowing down. While disruption will likely be accelerated in the year(s) ahead, PIE's relentless commitment to helping our clients build real, human relationships – and our ability to connect executives who are working through these thorny challenges – will cement our position as a trusted advisor to our clients.

Internally at PIE, many ideas and plans we'd been working on for a long time were brought to life in 2025 – from publication of *The Growth Engine*, to hosting our first ever Marketing & Growth Leaders Summit in Montana, to executing on our leadership succession plan, to getting out in the community as a full company for a day of service at non-profits across the Gallatin Valley, to developing new service offerings to better support our clients.

Dozens of great minds had these ideas in the works over the past few years, and it was an absolute joy to experience the fruits of this labor. At PIE, we are focused on the four pillars that keep us growing and thriving each year: Clients, Colleagues, Company, and Community.

Serving Our Clients. In 2025, we became even more focused on listening to our clients and actively making changes based on what we heard. We named PIE's first ever Chief Client Officer, Erika Flowers, to our leadership team, ensuring our client voice stays at the center of all we do. We invested more heavily in the service offerings our clients were asking us for: client advisory boards and client feedback programs; business development and account planning workshops; and content focused on client and market insights – for which we hired our first Director of Content to help lead us forward.

We also hosted our first-ever in-person gathering of marketing and growth officers from across professional services, providing a place for our clients and connections to convene and learn from each other (while also picking up some new fishing and horseback riding skills here in Big Sky Country!).

Serving Our Colleagues. The importance of our benefits package was underscored this year as PIE packmates grew their families, with more than 10% of our staff making use of our 12-week paid maternity and paternity leave policy throughout 2025. We had some great learnings about how to best manage this as a business, given we expect this trend to continue. At our annual summer family gathering, we got to experience the joy of PIE little ones running around with each other and remind ourselves that the work we do here every day is in service of our lives and families.

Additionally, as we prepared for growth in 2026, we hired our largest-ever class of new hires, bringing on 16 new teammates in November 2025. This diverse cohort brought us new language skills, geographic diversity, and backgrounds across consulting, tech, higher ed, sustainability, healthcare, and government. They are already hard at work delighting PIE's clients.

Serving Our Company. In 2025, we took two major actions to support the long-term strength and growth of PIE. We executed on our planned leadership succession: I stepped into the CEO role after over a decade of working with PIE's clients and growing the company alongside Tom McMakin, who shifted from CEO into the role of Executive Chair. During Tom's 15 years as CEO, he led PIE through steady growth, earned PIE a reputation as a top employer in the Gallatin Valley, and built a team that is ready and eager to carry PIE into the future. I am immensely grateful to Tom for his stewardship of PIE over the past 15 years.

We also published our third book in September 2025, *The Growth Engine*. This book spells out how professional services firms can develop mature, scalable business development functions. It is based on the findings from interviews with more than 100 senior executives, including many of PIE's clients. *The Growth Engine* was co-authored by Walt Shill (PIE advisory board member), Jacob Parks (PIE President), Erika Flowers (PIE's Chief Client Officer), and yours truly (PIE's CEO), and, alongside PIE's prior two publications, has helped cement PIE as a thought leader on the topic of growth in professional services.

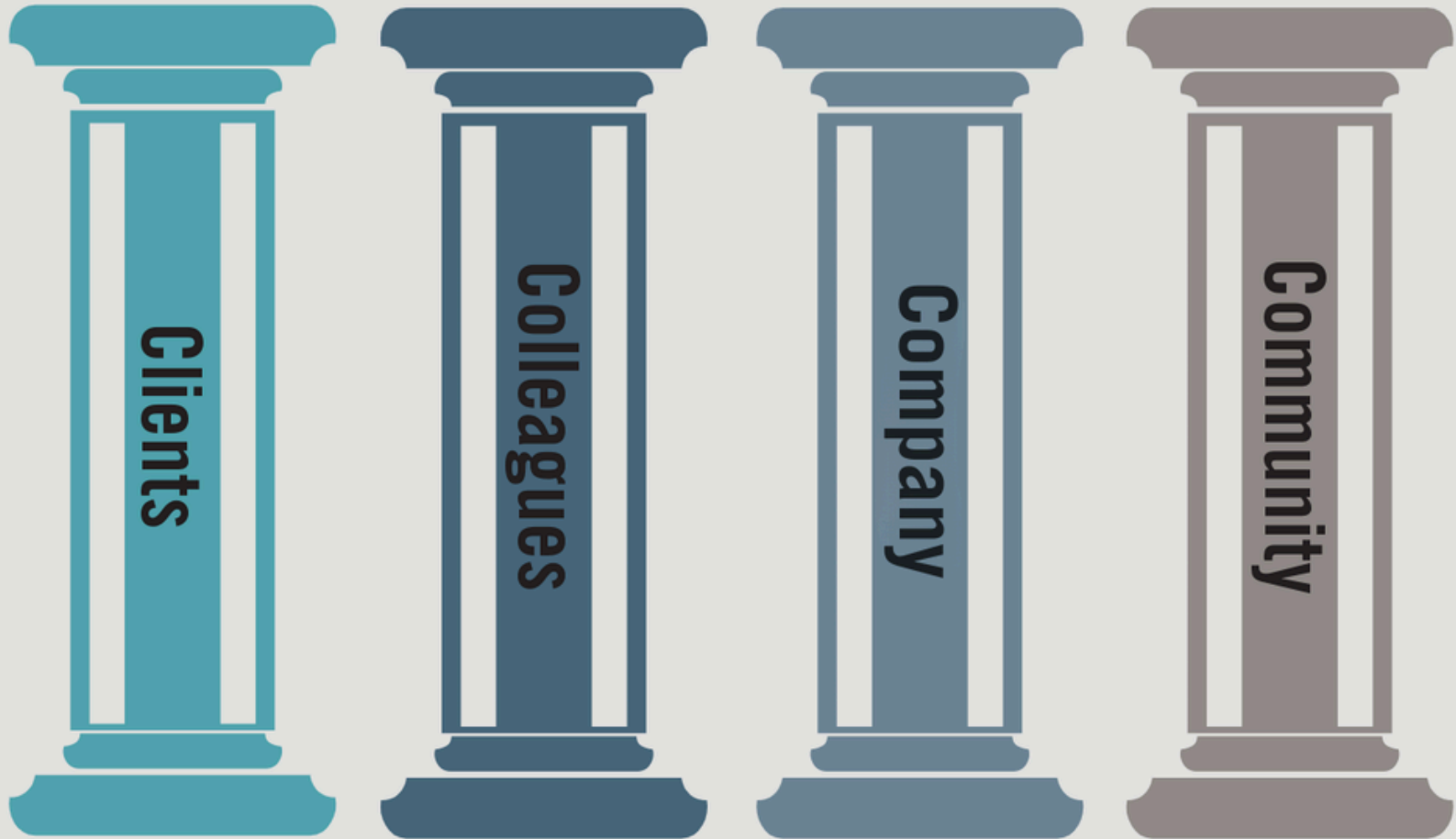
Serving Our Community. In 2025, PIE earned B Corp recertification and legally became a Public Benefit Corporation. These actions demonstrate our commitment to making decisions for the company that take into account not only our shareholders, but our clients, colleagues, and community as well. We continued to host pro bono roundtable programs for other B Corp leaders as well as DEI-focused conversations for organizations around the Gallatin Valley who are committed to creating inclusive workplaces. Finally, we hosted our first ever company-wide Community Give-back day, during which all our team members worked alongside a variety of local non-profits to plant trees, support our local Human Resources Development Council warming shelter and their efforts to curb hunger and homelessness, and partnered with Eagle Mount to help them prep for their annual fundraising event focused on supporting those with disabilities and children with cancer through recreation opportunities.

I am deeply grateful to our colleagues and our clients for showing up with enthusiasm, curiosity, and dedication throughout 2025. We're ready for the new challenges that 2026 has in store!



About PIE Pillars

The PIE Pillars



The purpose of the PIE Pillars is to guide the organization towards achieving its strategic goals and fostering a positive, inclusive, and high-performing workplace.

Overview

The PIE Pillars were developed in November 2021 at a company-wide strategic offsite. Over the last five years, they've acted as the foundation of our business in our pursuit of sustained success.

These pillars continue to be what drives PIE in how we show up for our clients, our colleagues (often referred to as our packmates), ensuring the future success of our company, and leaving our mark within our community.

Pillar 1

We will be our clients' most exceptional partner.

Pillar 2

We will be the most exceptional and sought-after workplace in Gallatin Valley.

Pillar 3

We will be financially independent, operationally strong, and on a path toward continued growth.

Pillar 4

We will be a lever for good.



We will be our clients' most exceptional partner.

1. We will have an unbelievable membership machine that blows our clients' minds and drives client growth.
2. We will have a thriving, scalable training machine to develop new client partners and drive client success.
3. We will offer new services, representing 20% of our revenue growth, allowing us to serve our clients more fully.
4. We will renew 90%+ of our renewable work and realize 95%+ of our expected revenue.
5. We will develop a process to help our clients demonstrate ROI on our programs to ensure renewal.
6. We will be in the vanguard of the remote/hybrid/in-person transition, being the chosen partner in any venue.
7. We will be sought after as trusted partners, with a brand bolstered by regular thought leadership publication.

What defines our signature client experience:

PIE's clients should always feel that:

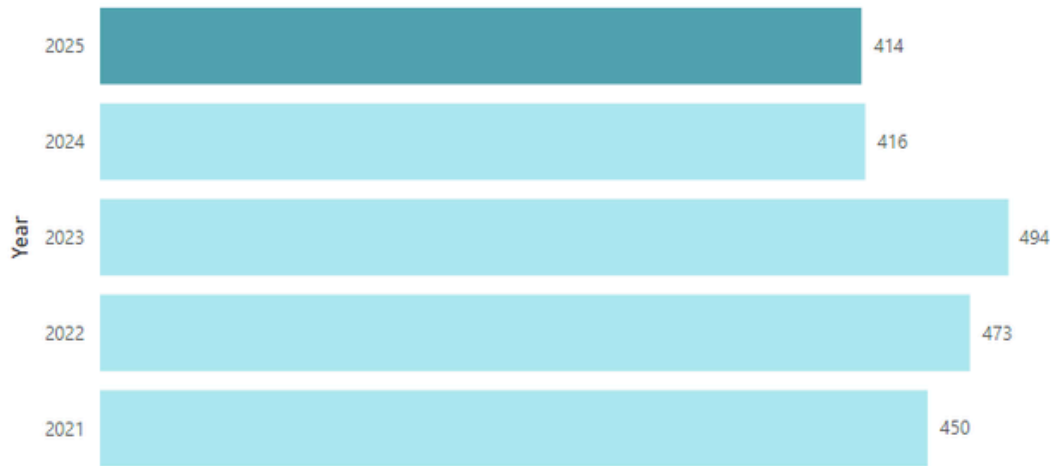
- We are a true partner to our clients. We serve as an extension of their teams, and we are invested in their success. We are recognized as trusted friends to our stakeholders.
- We anticipate the needs of our clients, proactively and creatively helping our clients achieve their objectives. We always own the next action and bring solutions to the table.
- We show up professionally and with a steadfast orientation toward helpfulness, ensuring our clients are always prepared and set up for success.
- We bring a human touch to every interaction; we are agile and adaptable and thrive in any setting.

Market Insight

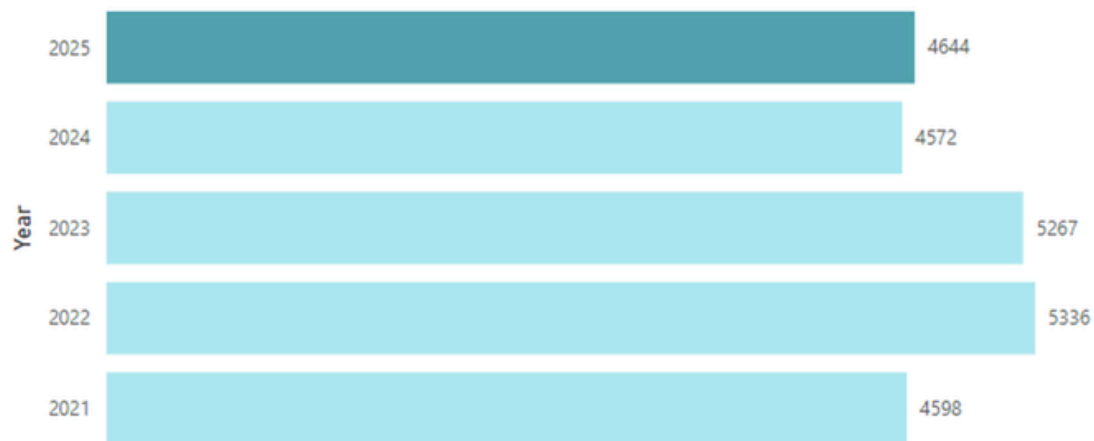
2025 marked an important milestone for PIE in how we serve our clients across the business development value chain. While our roots in facilitating executive communities continue to drive our business and serve our clients, the ways in which we help our clients grow have expanded. PIE clients turn to our team to help them level up the skills of their business development leaders, drive deeper connections with their most important clients, incorporate the voice of their customers and the market in their strategic roadmaps, and produce unique insights and thought leadership that set them apart from competitors in a crowded content world. While our delivery of executive community roundtables remained flat, PIE grew last year based on the expansion of our additional service lines. We also continue to differentiate ourselves based on our ability to bring hard-to-reach executives to the table, recruiting executives for both client advisory boards and executive communities.

Delivery Metrics

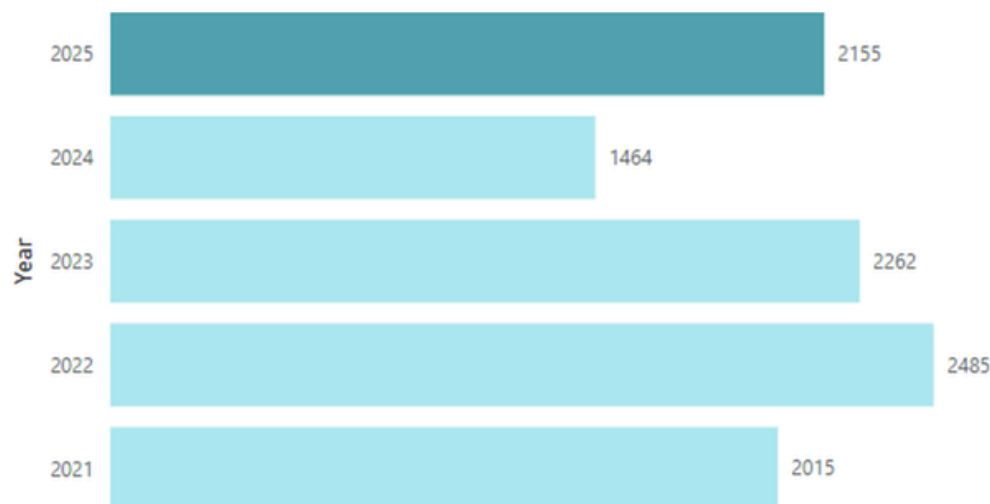
Virtual and In-Person Engagements Delivered



Total Interviews with Executive Members Before Virtual and In-Person Engagements



New Executives Recruited into Client Engagements



New Work

This graph outlines the total number of new projects contracted in 2025, including but not limited to Executive Communities, Advisory Board Communities, and Business Development Trainings, with both current clients and new logos across business lines.

- 17 Packmates contributed to PIE's Growth.
- 64 total new business opportunities closed and won.
- 19 new logos added, comprising ~ 10% of our total revenue on the year.
- 70% of our clients expanded the work they do with PIE, either expanding existing services or increasing the number of communities, advisory boards, and workshops they power with PIE as their partner.

New Work Contracted

● Client Expansion ● New Logo Work



Pillar 2: Colleagues



We will be the most exceptional and sought-after workplace in Gallatin Valley.

1. We will be the most exceptional and sought-after workplace in Gallatin Valley.
2. We will continue to hire and retain high-performing, helpful people who reflect our core values, which include championing community, celebrating diversity, and fostering inclusivity.
3. We will continue to create growth opportunities for the high-performers at PIE.
4. We will develop strong leaders as we grow, to lead in the future both inside and outside of PIE.
5. We will ensure the right people are in the right seats for the future.
6. We will continue to expand the ownership of PIE.
7. We will start to build a presence outside of the Gallatin Valley to connect with talent in other geographies.

Staff Metrics

PIE continues to adapt its operational and staffing approach to ensure sufficient resources and expertise as client demand grows. In 2024, PIE saw a slight decrease in total full-time headcount, commensurate with the decrease in annual revenue. Client growth and two associated hiring rounds in 2025 resulted in an increased headcount in 2025.

Historical Staffing Numbers

Date	Headcount (Full Time)
2025	63
2024	55
2023	57
2022	70
2021	80

- Packmates Hired: 16
- New Promotions: 7 in total including Chief Executive Officer, Senior Project Coordinators, Managing Director, and Account Coordination Manager
- New Positions: Director of Content, Chief Client Officer, and Marketing & Graphic Design Coordinator
- The shift in numbers over the years represents the company becoming more efficient in how we are structured to support service lines and in management of our client delivery and staff support functions.

Hiring: Applicant Count

In pursuit of being the most sought-after employer in the Gallatin Valley, PIE closely monitors both the volume of inbound interest during non-hiring periods (e.g., “Let’s Be Friends” submissions) and the number of applications received for full time positions during active hiring rounds.

Historical Candidate Numbers

Date	Let’s Be Friends	AD Candidates	PC Candidates
2025	35	2 Hiring Rounds 89 Candidates	2 Hiring Rounds 72 Candidates
2024	10	2 Hiring Rounds 35 + 9 EMEA/APAC Candidates	1 Hiring Round 33 Candidates
2023	26	2 Hiring Rounds 70 + 25 EMEA / APAC Candidates	1 Hiring Round 9 Candidates
2022	30	1 Hiring Round 19 Candidates	1 Hiring Round 8 Candidates

New Benefits Added in 2025

- Healthcare Flexible Spending Account (FSA) that allows employees to contribute pre-tax dollars toward eligible expenses for medical, dental, and vision care.
- Dependent Care Flexible Spending Account (FSA) to allow employees to contribute pre-tax dollars for eligible expenses such as daycare, preschool, and elder care.



Employee Satisfaction for 2025 (eNPS)

Employer Net Promoter Score is a scoring system designed to help employers measure employee satisfaction and loyalty within their organizations, as well as a metric used to measure employee engagement and satisfaction.

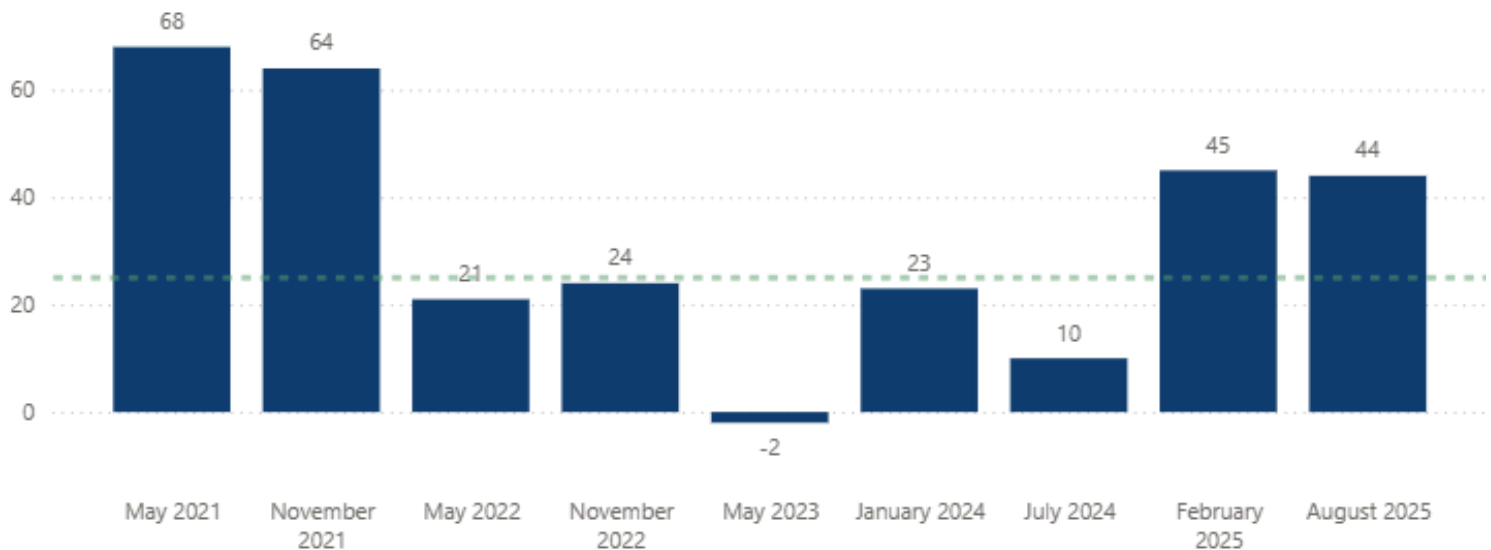
PIE's 2025 Scores

eNPS scores range from +100 to -100, with higher scores indicating stronger employee satisfaction and a greater likelihood that employees would recommend PIE as a place to work. Positive scores signal that more employees are promoters than detractors, while scores above 25 are generally considered strong and indicative of a healthy employee experience. PIE's eNPS objective in 2025 was to achieve consistent scores of 25 or higher, reflecting sustained employee engagement rather than a single-point improvement. The graph below illustrates PIE's eNPS performance over time. With a score of 45 in February 2025 and 44 in August 2025, PIE not only met but significantly exceeded its 2025 eNPS goal, demonstrating strong and consistent employee sentiment throughout the year.

As a result of feedback collected through eNPS, PIE leadership has strengthened the communication of company strategy and goals through the implementation of a more robust, structured enterprise feedback funnel. This approach systematically captures organization-wide input and clearly demonstrates how feedback is evaluated, prioritized, and integrated into the company's strategic plan over a 12-month planning horizon. Additionally, leadership has clarified roles and responsibilities across the organization, establishing clearer ownership and accountability. As part of this effort, a dedicated task force has been established to drive process improvement and support more accurate workload and resource planning.

Historical eNPS Scores

eNPS Score by Year and Month



JDEB: PIE's Justice, Diversity, Equity, and Belonging initiative

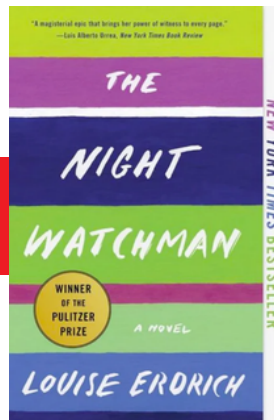
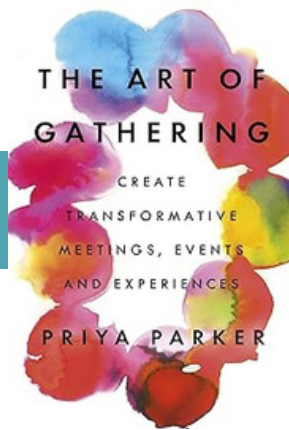
PIE's JDEB initiative continues to shape how we build a workplace grounded in trust, inclusion, and shared responsibility. We believe diverse perspectives make us more resilient as a business, and we remain clear that our people are at the heart of everything we do. JDEB brings these principles into practice by offering both accountability and a thoughtful path forward. Through this work, PIE collaborates with other local organizations via a DEI Roundtable, creating space to learn together and challenge assumptions about what inclusive workplaces can be. Internally, JDEB encourages continuous growth through monthly internal conversations that keep equity and belonging at the forefront of our collective thinking. We also host quarterly book discussions with titles like *The Art of Gathering*, *The Night Watchman*, and *Cassandra Speaks* to invite reflection, dialogue, and action.

Our book selections are intentional and closely tied to both our work and our context. *The Art of Gathering* by Priya Parker reinforces the importance of purposeful, inclusive gatherings – an essential part of PIE's mission to foster meaningful conversation. The book challenges us to be deliberate about why and how we bring people together, emphasizing the role of thoughtful design and facilitation in creating spaces where participants feel connected and engaged.

The Night Watchman by Louise Erdrich and *Cassandra Speaks* by Elizabeth Lesser deepen our understanding of equity, voice, and representation. Together, they encourage reflection on Indigenous histories and lived experiences – particularly relevant in Montana – as well as how long-standing narratives influence whose voices are heard and valued, especially in workplaces largely made up of women. These discussions reinforce the importance of listening, humility, and creating environments where diverse perspectives and communication styles are respected and encouraged.

Quarterly & monthly conversations ensure equity and belonging are not one-time initiatives, but ongoing commitments. As PIE looks ahead, JDEB remains essential to fostering a workplace where everyone feels seen, supported, and empowered to contribute to our shared future.

JDEB Book Club





We will be financially independent, operationally strong, and on a path to continued growth.

1. We will be financially independent, operationally strong, and on a path toward continued growth.
2. We will substantially pay down debt and recap our remaining debt to prepare for our wholly owned future.
3. We will leverage technology to make strong, data-informed decisions about PIE's finances and operations.
4. We will have a pricing model that helps drive predictable growth and profitability across our client base.
5. We will have a utilization model that ensures we are using our resources in a profitable manner.
6. We will ensure we have a team of growth-minded individuals, moving PIE into the future.
7. We will build a process to leverage our strong client relationships and more systematically obtain referrals.
8. We will continue to make new friends, building a business development pipeline and structure that drives predictable and sustainable new logo growth.
9. We will explore strategic acquisitions that would be a good fit for PIE – culturally and financially.

New Leadership

In July 2025, Andi Baldwin stepped into the role of CEO as part of a long-planned transition from Tom McMakin, bookending his 15 years of leadership. Tom continues to serve PIE as Executive Chairman of the board while Andi is excited to lead the next chapter of PIE. In her first 6 months as CEO, Andi met with every PIE employee to understand first-hand what the company is doing well and where we can continue to improve. Key takeaways from these 1:1 conversations include:

Great	Even Better
<ul style="list-style-type: none">• Supportive people• Autonomy and flexibility• Engaging, interesting work• Strong culture and sense of community• Clear opportunities for growth• Competitive benefits• Excellent supervisors and coaches• A culture where “everyone ends the year smarter”	<ul style="list-style-type: none">• More effective use of AI and automation to drive efficiency• Clearer and more transparent career paths• Bigger bench for better workload balance• Increased opportunities for compensation growth• Greater role specialization over time (content and/or function)• Continued innovation in membership offerings and program launches• More effective meetings, as a way to have fewer

Report Card on 2025 Company Goals

- Created dashboard visibility into workloads and project profitability.
- Set a time tracking goal of 80% and achieved an actual of 76.73%.

PIE's Performance

"2025 was a year in which PIE returned to a comfortable growth position closer to our historic and desired growth. The constant uncertainty in the overall macro-economic environment had a much larger impact in 2024 than 2025, as clients determined they could not put off investments in understanding and serving their clients even in the midst of uncertainty. PIE continues to make investments in data management and analytics to inform our decisions, and to provide insights to our clients on the programs they invest in with us. Our accuracy in forecasting allows us to better match labor to our expected revenue and in turn maintain the healthy margins that allow us to continue to make investments where they are needed, be it people or technology. We added the ability to track our progress around growing service lines, which have expanded to include Peer Exchange Communities, Client Advisory Boards, Business Development Trainings and Workshops, and Client and Market Insights."



-John Nord, Chief Operating and Financial Officer

Marketing Team Expansion

In 2025, marketing expanded its company footprint with the allocation of additional staff dedicated to creating online promotional content. Additional focus areas included coordinating the launch of PIE's new book *The Growth Engine*, organizing PIE's first annual summit in Bozeman, relaunching PIE's podcast The PIECast, and supporting client projects.

Metrics

- 58 inbound leads from website; 3 converted into opportunities, 1 won.
- 67K page views.
- 40% increase in home page rank in Google Search.
- 366% increase in traffic to website from LinkedIn.
- 45% increase in LinkedIn engagements and interactions.



Launch of *The Growth Engine*

In September 2025, PIE published its third book on growth in professional services, *The Growth Engine*, written by Andi Baldwin, Erika Flowers, Jacob Parks, and Walt Shill. Following the success of *How Clients Buy* and *Never Say Sell*, *The Growth Engine* is focused on helping firms grow and scale business development teams from Entrepreneurial to World-class across five dimensions: clients, services, talent, operating model, and technology. Published through Wiley in September, *The Growth Engine* serves as a practical guide for any professional services growth, marketing or practice leader focused on scaling and growing their business and is available everywhere books are sold.

To celebrate the publication of *The Growth Engine*, PIE hosted an intimate book launch event in New York City in October, welcoming 30+ clients, peers, contributors, and partners from across the world of professional services. The evening brought together leaders from consulting, legal, financial, technology, and advisory organizations to connect in person, reflect on shared growth challenges, and celebrate the culmination of a multi-year research and writing journey.

Hosted at The Skylark overlooking Midtown Manhattan, the event featured networking, cocktails, and a casual discussion with the book's authors, who shared key themes and insights drawn from more than 100 interviews with professional services leaders. The gathering served not only as a celebration of the book's release, but also as an extension of PIE's ongoing commitment to fostering thoughtful dialogue, community, and collaboration around what it truly takes to build a modern, scalable Growth Engine.



PIE Professional Services Marketing Leaders & PIE Growth Leaders Roundtable

In September, PIE hosted our inaugural Growth Engine Summit, a 2.5 day immersive and interactive workshop for growth and marketing leaders in professional services. We convened over 20 executives to dig into the impact of PE in professional services, the ways in which AI is transforming go-to-market efforts, solutions to bridge the divide between sales and marketing, and how best-in-class firms are investing in client feedback to support business growth. Participants walked away with learnings from their peers as well as guest speakers Charlie Green (co-author of *The Trusted Advisor*) and Walt Shill, former head of North America for Accenture and partner at McKinsey. Attendees also enjoyed all that Montana has to offer from horseback riding to fly-fishing, hikes around the local mountains, a visit to the spa at Sage Lodge and shopping in historic downtown Bozeman.

In addition to the inaugural in-person Growth Engine Summit, PIE convenes growth and marketing leaders in professional services virtually and in quarterly, regional gatherings in an effort to stay close to the market and learn alongside those swimming in the same business development waters. Lastly, we also launched a learning & development leaders community for peer conversations. By convening learning & development leaders, PIE creates a trusted forum to surface what is truly changing inside firms and translate those insights directly into the business development programs and capabilities that help professionals apply learning, drive growth, and deliver greater client impact.

PIE engaged these communities in the following ways in 2025:

- 21 total Exchanges hosted (17 virtual roundtables, 4 in-person events).
- 275 total attendees (attendees not distinct).
- 187 1:1 interviews complete.

The top themes that emerged in 2025 were:

Learning & Development

- Demonstrating the Business Impact and ROI of Learning.
- Operationalizing AI Through Practical Use, Governance, and Human Oversight.
- Driving Accountability and Sustained Behavior Change Beyond Training Events.
- Prioritizing Experiential, In-Context, and Live Learning Over Passive Models.
- Building an Owner's Mindset and Engagement Across Generations.

Chief Marketing Officer

- Adapting marketing strategy for the rise of generative and intent-based search.
- Elevating marketing as a strategic growth partner through data, governance, and early involvement.
- Driving growth through deeper client understanding, feedback, and the full client journey.
- Scaling content and insight delivery with AI while maintaining quality, trust, and control.
- Navigating cultural, political, and organizational complexity without losing authenticity or momentum.

Chief Growth Officer

- Maintaining disciplined focus on the Ideal Client Profile (ICP) to drive profitable growth.
- Shifting from individual selling to collaborative, account-led growth models.
- Designing compensation and incentive models that reward profitability, scale, and cross-selling.
- Streamlining and prioritizing service portfolios around what is proven, profitable, and repeatable.
- Embedding growth strategy into M&A decisions, lateral integration, and market pivots.



Pillar 4: Community



We will be a lever for good.

1. We will continue to be a “lever for good” in the lives of our employees, offering job experience and benefits packages that support the happiness, health, and wellbeing of our team members and their families.
2. We will explore opportunities to develop new service offerings and/ or engage in new projects that are both profitable and mission oriented.
3. We will continue to engage with our local community in meaningful ways, giving both financially and in-kind to the causes our people care about.
4. We will lean into our brand as the model of convening that is environmentally good for the world.
5. As we expand our board of directors, we will focus on adding more diverse board members.
6. We will maintain B Corp certification, reflecting our dedication to stakeholder values.

Volunteer & Charitable Donations

In 2025, PIE packmates used 509 hours of paid volunteer time off (VTO), in total, to support organizations across Montana (204 of that being our All Hands VTO Day).

All Hands VTO Day

- Eagle Mount – helped prep for an upcoming fundraiser.
- Gallatin Watershed Council – planted trees.
- HRDC Warming Center – cleaning, organization, and chore support.
- Family Promise – prepped for summer carnival.

Charitable Donations

A benefit that PIE provides is a \$200 donation on behalf of each packmate to a non-profit organization of their choice, for those who elect to use it. This year, we were pleased to provide \$7,400 in donations. Primary organizations were:

- Bridger Ski Foundation
- Eagle Mount
- Heart of the Valley
- Bridgercare

“As the COFO at PIE, I try to be transparent and honest with our team and say that we are in the game of business, and the game of business is to make money. However, I look at this over a long horizon as it is never our intention to chase short term results at the expense of our long-term success. This means being intentional about matching workloads to the work we have to deliver, and it also means giving back to our community in the form of time, resources, and frankly, dollars. I also talk about investments vs. expenses, with the difference being that spending money on something that can grow is always better than a simple expense. While PIE contributes greatly to our community and economic development by employing the people we employ, we also acknowledge that we have the ability to give back in other ways and in ways that engage our employees. I think people fundamentally want to make an impact in a positive way, and what is somewhat unique about our business is we have very few (if any) local clients. Community is important, so we look at time, resources, and money spent on our community as an investment in the community (where our people come from) and our people rather than an expense.”

-John Nord, Chief Operating and Financial Officer

B Corp Recertification

“We were thrilled to recertify as a B Corp in 2025, a company-wide effort that reflects our team’s commitment to operating in the best interest of all of our stakeholders, not just our shareholders. We are particularly proud of the work we’ve done to expand our benefits for PIE employees and show up in the community in the places our team cares about most.”

-Erika Flowers, Chief Client Officer

DEI & B Corp Roundtables

B Corp

- 3 virtual discussions with organizations around Montana focused on new B Corp expectations for recertification in the coming year as well as the strategic value of B Corp in organizations.
 - Score of 80 three years ago and 83.2 today.

DEI Community Roundtable

- 3 virtual discussions with local organizations in Bozeman focused on the post inauguration landscape, DEI and AI, as well as navigating immigration issues occurring in our community.

Certified



®

Corporation

What it Means to be a B Corp

B Corp Certification is a designation that a business is meeting high standards of verified performance, accountability, and transparency on factors from employee benefits and charitable giving to supply chain practices and input materials.



Looking Ahead with CCO, Erika Flowers



Looking Ahead

“This year marks PIE’s 25th anniversary as an organization, marking a quarter decade of partnering with our clients and the executives they serve to make the world smaller and smarter. 2026 feels like a major inflection point in PIE’s history, one that will usher in accelerated expansion of what we do and who we serve. I am excited to see the ways in which we can more robustly serve clients across the business development ecosystem through business development audits and training, account mapping, programs that help post-merger clients capitalize on cross-selling, client advisory boards, executive communities, outstanding live events, and unique client and market insights based on the 1:1 connections we enable for our clients. 2026 is also the year of listening – both to the clients we serve and the people who power this organization. PIE is doubling down on our own client feedback and client advisory boards, directing greater attention and resources to retention both of employees and client revenue, and re-investing in the experience of our executive members who participate in the roundtables we deliver. While we are excited to more fully leverage AI and new technology to enable what we do, we continue to keep humans at the center of our business. The people are the heartbeat of this company and will continue to create and imagine the future of PIE both in 2026 and for our next 25 years.”

-Erika Flowers, Chief Client Officer

Land Acknowledgement

Profitable Ideas Exchange acknowledges the historical context of the land we occupy. We live, work, and recreate on the unceded, traditional, ancestral land of more than five indigenous tribes—a widely known meeting and gathering place for Native people. We recognize the violence this land and its peoples endured and continue to endure. We celebrate that this land is still held in reverence. We acknowledge that this statement is a small part of the larger, ongoing work of fostering a true reconciliation in disrupting of the legacies of colonialism across Montana and the United States.



Profitable Ideas Exchange, a Bozeman, Montana-based company founded in 2001, is a trusted business development partner for consulting and professional service firms. Our mission is to cultivate meaningful connections between our clients and high-level executives. We actively foster executive communities, client advisory boards, and thought leadership projects, delivering tangible results. PIE provides comprehensive training services to empower our clients' business development teams. We are proud to be a certified B Corp and engage as a lever for good in the communities we serve.

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