

INNOVATIVE GROUP × CUPPLES KELLER DESIGNS

Discovery Session

Internal run of show

Thursday, September 3, 2026 · 1:00 to 5:00 PM · The CKD studio

NOT FOR CKD

This is ours. Do not leave a copy on the table.

Chris Salazar · Andy Seo · Michael Sykora

Version 4 · supersedes the v2 playbook and the separate internal run-of-show page

The shape of the afternoon

The team is with us for the first eighty-five minutes and again from ten past four. Amy and Keith carry the middle on their own.

Time	Runs	Block	In the room
1:00	15 min	Module 1 · Welcome and warm-up	Whole team
1:15	30 min	Module 2 · CKD on a Page	Whole team
1:45	40 min	Module 3 · Brand and the market	Whole team
2:25	10 min	Break · the team heads back to work	AI window 1
2:35	30 min	Module 4 · Vision and the numbers	Amy and Keith
3:05	45 min	Module 5 · The growth engine	Amy and Keith
3:50	15 min	Break · the team comes back in	AI window 2 starts
4:05	25 min	Module 6 · The next 40	We present
4:30	30 min	Summary and close	Whole team
If we run long, protect the summary and close. Trim Module 5 first by reviewing three items per board instead of all of them. Never trim the close; the last twenty minutes are what the team remembers.			

Speak their language

Every module maps to a phase they already run. Say it out loud at the top of the day.

Their phase	Today
Programming	Modules 1 and 2
Schematic design	Module 3
Design development	Modules 4 and 5
The rendering	Module 6
Construction documents	Summary and close

Three rules for the room

- Nobody facilitates and writes at the same time. It kills the conversation while you catch up.
- Silent writing before any go-round. If people answer out loud in order, the second person adjusts to the first and by the sixth everyone agrees with Amy.
- Close every module by circling the repeats and putting gold on what the room agrees with. Progress has to be visible or four hours feels like talking.

Blue sticky is Amy. Purple is Keith. Green is the team. Gold stamp means locked, red dot means open, amber dot means parked.

1:00

15 MIN

Whole team

A project you were excited about

ASK THIS

Let's get to know everybody first. We'll go around the room. Name a project you were excited to work on, and tell us what made you proud of it.

Say this part before the first person answers, or you will get an apology instead of a story:

- It does not have to be a CKD project. School counts, a previous firm counts.
- Four of the eight are recent hires. Take the pressure off out loud.

ON THE WHITEBOARD

No titles. We write keywords live as each person talks.

keywords, as they come

we write

Translate fast. "I had no idea how to do it and I figured it out" goes up as LEARNING SOMETHING NEW or BIG CHALLENGE. Ask "did we catch it?" and let them correct the word.

Circle a word when it repeats. At the end, gold-sticker the ones the room agrees define CKD.

The follow-up that earns its keep

When someone names what they were proud of, ask whether it was the feeling or the money. Both are useful and they point opposite ways.

If Amy says profitability, take it somewhere: "if a prospect wants something genuinely interesting for five hundred dollars, do you walk away or do you entertain it?" That is where the real operating principle shows up.

Then the weekend question. What would you do with a free weekend and no money worries? This is a talent audit wearing a party hat. Somebody in that room shoots, writes, or lives on social, and they go into the marketing plan instead of a vendor.

FACILITATES

Michael

WRITES

Chris and Andy, both with markers

WATCHES / CAPTURES

Andy photographs at the end

CAPTURE · photograph the board, then paste this

Attached is the warm-up whiteboard from the CKD discovery session, 3 Sept. Eight people: Amy Cupples (principal), Keith Billick (studio director), Monty Hill, Nathalia Frignani-Burini, Cathryn Ng, Mark Penaran, Mim Hossain, Lin Ellis. Several are recent hires.

Transcribe every word on the board, then:

1. Group them into themes and say which repeat across people.
 2. Give me eight to twelve candidate brand words in their language, not ours, ranked by how often the idea came up.
- Hold these. More boards are coming.

1:15

30 MIN

Whole team

The whole studio on one wall

ASK THIS

Now let's map the business itself. Five headers on the wall.

Three of them you fill in yourselves with stickies. Two we'll talk through together and we'll do the writing.

ON THE WHITEBOARD

All five titles go up. The three sticky zones sit together on the left so we can draw lines across to the two we facilitate.

Who we serve	What we make	What gets in the way	How work comes in	How we make money
stickies	stickies	stickies	we write	we write

Keep all five visible even while the right two are empty. We come back and draw the connections between them, and star the ones that matter.

STICKY NOTES

■ Amy	Who we serve and what we make. This is where we want her focused.
■ Keith	Same two. He fills the gaps Amy leaves.
■ Team	Welcome to add to any zone, but what gets in the way is theirs. Challenges today, things that are inefficient, anything they are working around. A brand new hire can draw on a previous job.

Ten minutes of quiet writing, then everything goes up.

Then we facilitate the right two

Pipeline first: where does work actually come from? Then money: which project types are profitable, and what are the win rates?

The thing to chase, which Amy has hinted at before: a low win rate in a highly profitable area. If that shows up, the job is not more marketing, it is more RFPs in that lane and better material to win them. Draw the line on the board between the pipeline zone and the money zone when you find it.

FACILITATES
Michael

WRITES
Andy, on the two facilitated zones

WATCHES / CAPTURES
Chris tracks brand threads

CAPTURE · photograph all five zones, then paste this

Attached are the five zones of CKD on a Page from the 3 Sept session.

Sticky colors: blue is Amy, purple is Keith, green is the team.

1. Transcribe each zone separately, noting sticky color per item.
2. Draft CKD on a Page in their own words.
3. Which zone is thickest, which is thinnest, and what does that say about where their attention actually goes?
4. List any contradiction between what leadership wrote and what the team wrote. Be blunt about these, they are the valuable part.
5. Flag any low win rate sitting next to high profitability.

1:45

40 MIN

Whole team

How the outside sees them

ASK THIS

We've just looked at the business from the inside. Now let's look at it from the outside.

Three things: how you talk about yourselves, who you come up against, and what your clients say. We'll do them one at a time, about five minutes each.

ON THE WHITEBOARD

Put all three headers up at the start so they can see what is coming, then work through them one at a time.

A · What you tell people	B · The firms you meet	C · What clients say
stickies	stickies	we write

A · What do you tell people CKD does?

Everyone writes their own at the same time. Not the official version, the one they say at a dinner.

Names on the stickies. We post them in order of seniority, Amy first, then Keith, then Monty, then down to whoever joined most recently. The point is watching the story change as it travels down the studio. Everyone should see that their intern has a different version, because that is the argument for doing this work at all.

B · The firms you come up against

Two columns on the board. Get the list first, then work the second column.

The firm	What a client would like about them, and what they would not

Do not grind through all of them. Pick one apart properly. The point is what clients like and dislike about the alternative, the way Christa told us those HOAs never answer their email. If that is the bar, answering email is a positioning line.

Put a target mark next to the one they most want to beat. It is a good moment in the room.

C · What clients say when they say something good

A conversation, not an exercise. They will not have quotes ready. Ask it open and we write:

- When a client is happy with you, what do they actually say?
- Has a client ever told you why they picked you over another firm?

FACILITATES Michael	WRITES Chris and Andy	WATCHES / CAPTURES Andy photographs and uploads
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Cut, do not run: the thirty printed word cards. Handing them our vocabulary leads the witness. The list is in the back of their workbook as a takeaway, and in the back of this book if the room dries up.

CAPTURE · photograph the stickies in the order posted

Attached: the "what do you tell people CKD does" stickies from the 3 Sept session, posted in seniority order (Amy, Keith, then the team down to the newest), plus the competitor board and the client-quote board.

1. Transcribe each answer with the person's name.
2. Show me the drift: what does leadership say that the newest people do not, and what do the newer people say that leadership never mentions?
3. Pull the words and phrases appearing in three or more answers.
4. From the competitor board, list each firm with what a client likes and dislikes about them, and what open ground that leaves.
Do not invent firms I did not give you.
5. Keep the client quotes verbatim. Do not rewrite them.

Ten minutes, and we work

Thank the team properly and let them go. Make it feel like a milestone, not a dismissal. Tell them we want them back at ten to four for the good part.

Set up while the kettle boils

- Clear the wall. Module 4 needs two big pads on the wall, one for Amy and one for Keith, blank.
- Their small stickies and pens at both seats.
- Do not draw the impact and effort axes yet. Those are Module 5.
- Move the two chairs in. It should feel smaller and more private than the last hour.

BREAK PROMPT · upload everything so far, then paste this

You now have the warm-up board, all five zones of CKD on a Page, and the Module 3 stickies and competitor board from the CKD session, 3 Sept.

In under ten minutes give me:

1. A draft "CKD on a Page" in their own words.
2. One positioning line in their voice, plus two alternates.
3. The words that repeat across the whole room, with who said each.
4. Any contradiction or non-alignment worth raising this afternoon.
5. One thing we should ask Amy and Keith in the next hour that we would not have thought to ask before reading this.

Keep it short enough to read standing up.

Where they are, and where they want to be

Frame this before anything else. We are their marketing and brand people. We are not telling them how to run an architecture practice and they will smell it if we try. We need the target so we do not market them into a corner.

ASK THIS

Three questions. We'll take them one at a time. Five minutes to write, then we talk it through before we move on.

Put numbers on it wherever you can, whatever you actually run the business by.

ON THE WHITEBOARD

One big pad each. Same three questions on both, taken together, one at a time.

1 · Today	2 · At the 40th	3 · The long game
Amy and Keith write	Amy and Keith write	Amy and Keith write

Do not ask them to draw the org chart. We moved away from their organizational structure on purpose.

1 · Where you are today

- How do you see the business right now? Are you where you thought you would be?
- With the team exactly as it is, how many projects can you carry, and at what size?
- Does what comes in match the effort going out?

2 · Where you want to be at the 40th

- Where should CKD be as a business in 2028?
- And where do you want to be personally, in your own role? A name on the door, a book, a certain kind of project.

The personal half is the one to protect. Keith may want to be a name partner. Amy may have a revenue number and a book. Neither has necessarily heard the other say it. If a gap opens, Chris notes it and it goes in the follow-up to Amy, never on the wall.

3 · The long game

- Past the 40th. Legacy and hand it on, sell it, or keep it this size and make it better?
- What does success look like when you get there, in numbers?

FACILITATES Michael	WRITES Andy	WATCHES / CAPTURES Chris reads the gap between
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		them
CAPTURE · photograph both pads, then paste this Attached: Amy's board and Keith's board from Module 4, 3 Sept. Three questions each: where they are today, where they want CKD and themselves to be at the 40th in 2028, and the long game past that. 1. Transcribe both boards, keeping the numbers exactly as given. 2. Work out the gap between today's capacity and each milestone. How much more work per year is implied, in their own units? 3. Given that gap, what does the marketing have to deliver, and more importantly what must it NOT deliver? Where would too much demand hurt them? 4. Where do Amy and Keith answer differently, especially on the personal question and the long game? Do not recommend hires or org structure. We are the marketing team.		

Everything on their plates, sorted

ASK THIS

Now the ideas. Write down every growth project you have, meaning the work you do to win work rather than the client projects themselves.

At least five, and as many more as you want. Things you already do and things you have only thought about.

ON THE WHITEBOARD

Draw the axes on both pads before they sit down. Effort along the bottom, impact up the side.

EASY WINS	BIG BETS
high impact • low effort	high impact • high effort
Second row of the same grid: INCREMENTAL bottom left (low impact, low effort), MONEY PIT bottom right (low impact, high effort). Write the quadrant names on the pad, not just the axes.	
EASY WINS do these now	BIG BETS worth it, resource them
INCREMENTAL never the priority	MONEY PIT stop, shrink or hand off

Every sticky gets marked E if they already do it today, or N if it is a new idea. That marking is where the value is: watching an existing monthly commitment land in the money pit is the moment that pays for the session.

How it runs

- Ten minutes of silent writing on their own small stickies, one idea per sticky. Not the full forty-five.
- Then rip and post, and review side by side.
- Take two at a time, place them, discuss, then go back for the next two. Do not try to sort all of them at once.

Question bank

- If you could add five of the right growth projects in 24 months, what would they be?
- What is holding your best lane back: awareness, relationships, capacity, or positioning?
- Which of these do you enjoy, and which drain you?
- Which high-effort item could a new hire own instead of you?
- Of the things you already do, which are actually bringing work in?
- Is anything up there running on habit rather than results?

The two boards are a comparison, not a duplicate. Where Amy's easy wins are Keith's big bets, that is a difference of belief about the business and it is worth more than the list. Follow-up note to Amy, never on the wall.

FACILITATES

Michael, coaching the quadrants

WRITES

They write their own

WATCHES / CAPTURES

Andy shoots both boards, Chris reads dynamics

Bring everybody back in

Fifteen minutes. Coffee, and the room fills up again. This is deliberately the moment the team returns, so they come back to the best part of the day rather than to a debrief.

Running in the background

Upload the Module 4 and 5 boards now and start the prompt below. It runs while Chris presents The Next 40, which gives us roughly forty minutes of work before the summary.

AI WINDOW 2 · start this before Module 6, read it during

You now have everything from the CKD session: the warm-up words, CKD on a Page, the brand and competitor boards, the capacity and milestone numbers, and both growth boards.

Give me, in under forty minutes:

1. A one-line positioning statement in their words, plus two alternates.
2. The six to eight words that came up across the whole room, and who said each.
3. The three moves that matter most, sequenced, sized against the capacity number from Module 4.
4. What did we miss? What is high impact that nobody put on a board, and what did they put in the wrong quadrant?
5. One thing to say in the close that will land with the newest people in the room, not just with Amy and Keith.

Be direct where you disagree with the room.

4:05

25 MIN

Whole team

Our turn to present

Chris presents from the portal page. They sit back. This is the most enjoyable stretch of the day and the right note for the team to have rejoined on.

ASK THIS

This one is on us. Sit back. We're going to show you what a great anniversary and brand moment can look like, from firms in your field and a few from well outside it.
All we want from you is your reaction.

ON THE WHITEBOARD

Nothing on the wall. Screen only. Their workbook has the reaction columns.

That could be us	That is not us	Postcard from 2028

Andy notes what they lean toward and what they wave off. That reaction tells us more about their appetite than any questionnaire.

FACILITATES Chris presents	WRITES Nobody	WATCHES / CAPTURES Andy notes reactions, Michael watches the room
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SUMMARY AND CLOSE

4:30

30 MIN

Whole team

What we heard, and one next step

Playback and close are one block now. Andy puts the output on screen, Michael reads it back, Chris closes.

The balance to hold. Enough that it feels impressive and worth their afternoon. Not so much that we have given away the plan. The readout in a few days is the paid work. Show them the themes and the words, not the strategy.

What goes on screen

- CKD in one line, plus the two alternates, and let them argue with it.
- The words that kept coming up, with who said them.
- Three moves that matter most, named but not detailed.

Say plainly that nothing is final and we are not asking anyone to decide today.

The close, and this is the part not to rush

The team was out of the room for over an hour. Left alone that reads as decisions behind closed doors. Fix it out loud.

- Point at the wall of gold. Their words are in it.
- Say why they were here. Amy and Keith asked for the whole studio, not just the two of them. Most firms would not have. Say that in front of the team.
- Praise Amy and Keith to their own people. It carries further than anything they could say about themselves, and it is true.
- Name what it is for: one brand everybody here believes in and tells the same way, so the studio grows and everyone in the room grows with it.
- End on the 40th. We come back with the plan.

The outcome we want from the last five minutes, is that the team leaves feeling closer to each other and clear that we are here for all of them. If they feel that, every idea we bring back next month lands with less resistance. That is a marketing outcome, not a nicety.

In the pocket, do not raise

- Retainer, fees, or scope
- Amy's personal brand and the podcast idea
- The confidential read on Keith
- Deliverable minutiae

Kit, capture, and the room

What is in the box

- Post-it Super Sticky easel pads, 23 by 30. Four sheets free, two of them for Module 5.
- Post-it 3x3 in blue, purple and green, two pads each.
- Fine-tip Sharpies, a dozen. Chisel tips for the board. Dry-erase markers in case theirs are dead.
- Gold stickers for locked, red dots for open, amber dots for parked.
- Workbook v5, one per seat plus two spares. Name tents.
- Painter's tape and scissors.

Cut from the list: foam board, easels, the thirty word cards, competitor cards. Pads go flat on a table to write on, then onto the wall. The easel falls over.

Two recordings, always

Andy's laptop in the center. Chris's multi-speaker recorder on the far side of the room, running the whole session. A phone on voice memo as the third.

- The multi-speaker recorder separates voices. Fathom will not; it attributes everything to the host.
- Some of the newer staff are quiet and monotone. Repeat a quiet answer back so the mic gets it. It reads as active listening and it saves the transcript.
- Mim joins on Zoom. Somebody owns unmuting her and reading her stickies out. Assign it at the top or she is silent for four hours.
- Do not run three laptops on one Zoom in the same room. It will echo.

Photograph before you clear

Every board, straight on and whole, then a second shot close enough to read the stickies. Upload immediately rather than batching it to the end of the day.

Unknown at the time of writing

The size of their whiteboard and the shape of the room. It is supposed to be a whole other floor. Get eyes on it early and be ready to move more of the session onto pads if the board is small.

Back pocket: thirty words

Only if the room dries up. These are what other firms in their field actually say about themselves, taken off the about pages of Mithun, Hood Design Studio, SWA, CMG, PWP, Sasaki, GGN, OLIN, RHAA, Andropogon, Surfacedesign, SmithGroup and Perkins&Will.

Do not open with these. Their own words have to come first or we have led the witness. This is a rescue, not a plan. The same list is in the back of their workbook as a takeaway.

Everyone says these

innovative	sustainable	collaborative
beautiful	resilient	community
placemaking	award-winning	ecological
craft		

Common, and still worth something

equitable	inclusive	contextual
research-led	evidence-based	stewardship
wellbeing	holistic	authentic
thoughtful		

Largely unclaimed

legible	enduring	deft
responsive	rigorous	generous
precise	calm	plainspoken
dependable		

The gap worth knowing about. Only two of those thirteen firms mention being woman-owned, and neither builds anything on it. Almost nobody claims to be good at complex institutional work: hospitals that stay open, schools in session, public agencies and their review cycles. For a studio whose portfolio is the VA, Highland and Fremont High, that is the emptiest ground in the sample.