

High Beam Digital | Koinly Proposal

Context

Currently, the Koinly brand feels efficient but not entirely aligned with the ethos of the target market of self-motivated crypto investors. While the product is strong, the voice doesn't yet fully reflect the excitement of the sector or the ambition of your users.

The goal is to develop ToV that can balance the demands of your customers:

- **Trust:** positioning Koinly as a knowledgeable expert.
- **Convenience:** taking away the time/ knowledge burden of tax management for users
- **Success:** enabling the growth of their portfolio by managing risk and saving money.

Approach

ToV guidelines are only useful insofar as they are used, which means they need to be based on agreed goals and formatted for utility.

My goal is to take the vision from the **founder and leadership**, align it with the commercial realities of **sales and product** in a way that meets the strategy and needs of **marketing**. My role would be to source, challenge and refine internal and external insights, and codify it into practical, usable rules.

Process

1. Discovery & Alignment (Async + Workshop)

- **Stakeholders:** We keep this group small (CEO, Marketing, Sales/Product).
- **Async Questionnaire:** To gather initial thoughts and identify alignment gaps before we meet.
- **Strategy Workshop (2-3 Hours):** A focused session to synthesise the vision. Locate crossover and clashes between respective stakeholders, test and generate ideas, build shared perspective with active buy-in for next stage.

2. The Output: Practical Guidelines

- We will produce a set of clear rules (max 5 core principles) mapped to specific use cases that shape how Koinly communicates in a distinct, impactful fashion..

- This includes formatting guides, tone across use cases (e.g marketing vs support), compliant language, and universal vs local exceptions. .
- The document will be a **working tool** for content writers, app designers, and marketing.

Why me?

- **Fintech & Tax Fluency:** I have specific experience writing for tax and accounting software, having spent three years at Dext (AP automation) , as well as work in regulated industries, DeFi, infrastructure, banking.
- **Strategic Mindset:** I have been a marketing manager, commissioning my own writers and responsible for acquisition and conversion, so I think about results, not just words.
- **Detail-Happy:** I specialise in the technical parts of Fintech: taking complex details and making them compelling without dumbing them down.

Investment & Availability

- **Rate:** £500 per day
- **Availability:** I have availability to start immediately and can move quickly to accommodate your timeline.