



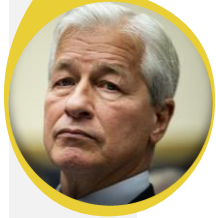
What do I do now? The 2023 Recession Playbook

November 2022



HighPoint
Associates

The Whispers have become a (not so dull) Roar



Jamie Dimon
JPMorgan
Chase CEO

There is a very, very **serious mix of headwinds**...things which are likely to push the US and the world – I mean, Europe is already in recession – and they're **likely to put the US in some kind of recession** six to nine months from now...



Sundar Pichai
Alphabet CEO

I hope all of you [employees] are reading the news, externally. The fact **we are being a bit more responsible through one of the toughest macro-economic conditions in the past decade**, I think it's important as a company we pull together to get through this. We shouldn't always equate fun with money



Pierre-Olivier Gourinchas
IMF Chief
Economist

Next year is going to feel painful. There's going to be a lot of slowdown and economic pain. This is a volatile period economically, geopolitically and ecologically



Elon Musk
Tesla CEO

Well, **I think a recession is inevitable at some point.** As to whether there is a recession in the near term, I think that it's more likely than not. **I have a super bad feeling about the economy**



Jeff Bezos
Amazon CEO

Yep, the probabilities in this economy **tell you to batten down the hatches**

What now – and how did we get here?



“Those who fail to learn
from history are
condemned to repeat it”
- Winston Churchill, 1948

Business Insider

Experts say last week's mass layoffs were just the beginning

Thousands of tech workers were laid off last week. Experts say it's just the beginning.



KNSI

Supply Chain Issues Expected Again for 2022 Holiday ...

Supply chains are unstable because of delays at seaports worldwide, and University of Minnesota Carlson College School of Bu



CNN

China's exports shrink unexpectedly as global slowdown jolts demand

China's exports and imports unexpectedly contracted in October, the first simultaneous slump since May 2020, as surging inflation and rising...



US News Money

Mortgage Rates Hover Around 7% as Fed Makes Another Rate Hike | Mortgages and Advice | U.S. News

Mortgage interest rates remain at their highest level in 20 years, with the 30-year-fixed rate averaging 7.21% this week.



Financial Times

'Crypto paradise' Singapore stung by high-profile collapses

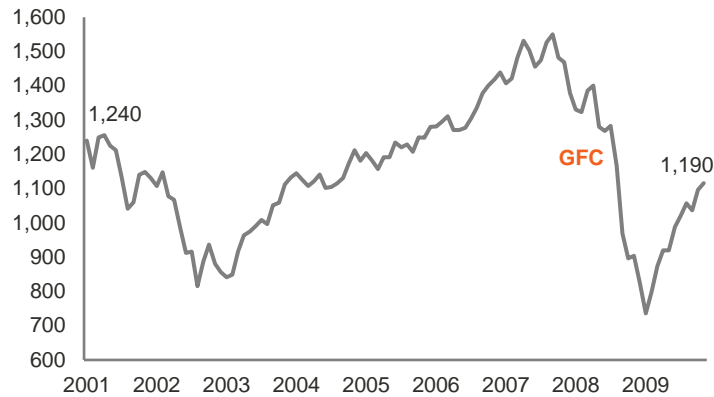
The international manhunt for Do Kwon, co-founder of collapsed cryptocurrency operator Terraform Labs, has put the spotlight on Singapore,...



The Lost Decade: 2001 to 2009

Financial Market Performance

S&P 500



Five Largest Market Caps in 2001...



A mix of the nation's largest industrial, software, oil & gas, pharma, and banking companies

This is the last time the top US companies will have this level of diversity

Global Financial Crisis Response

US Stimulus to Economic Crisis (\$ bn)

181



Economic Stimulus Act of 2008

937



American Recovery and Reinvestment Act of 2009

Largest economic recovery plan in U.S. history (to date)



Impact on Select Groups



- Bank failures, forced mergers
- New lending guidelines instituted
- TARP



- Production shifted offshore, enabled by logistics and outsourced services
- Financial services, RE and automotive hit hardest



- Unemployment peaked at 10.0%
- Employees forced to adapt to learn skills for the new economy

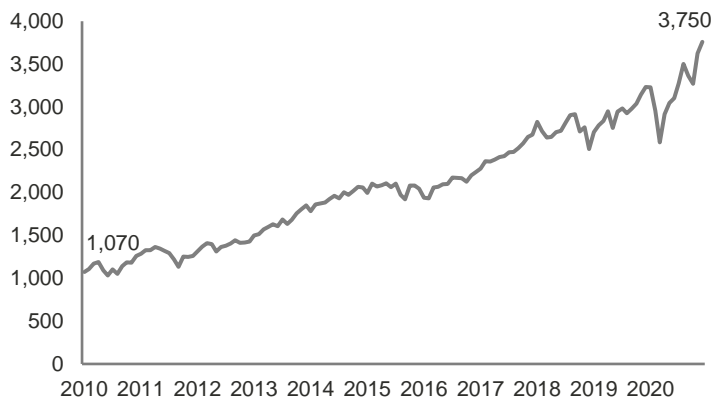


- New economy enabled by mobile commerce and consumer adoption
- Rich valuations begin to emerge for select tech firms

The Running of the Bulls: 2010 to 2020

Financial Market Performance

S&P 500



...and the Five Largest Market Caps in 2020



amazon



Alphabet

Meta

- We have become a technology driven populace, and the markets are now subject to the movements of these tech giants

2010 – 20 Bull Market



Record run following the wreckage from the financial crisis; From the GFC low in 2009 to end of 2021, the S&P was up **over 600%**; there is no 12-year period in the history of the U.S. public markets that approaches this number. **None.**

Consumers

- Shift in leisure activities from outdoors / TV, to phone-based entertainment; consumption from physical / retail to mobile / delivery
- Social media influence not just in trends / popular culture but also politics
- Incredible top end wealth creation drives median home prices 2.5x higher than 2001; median salaries only ~30% higher

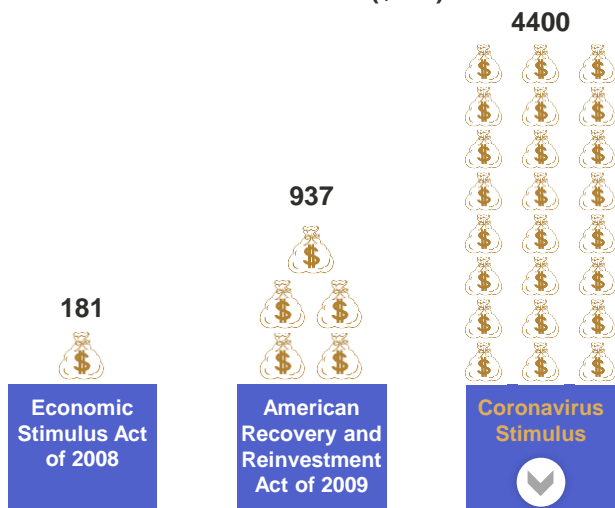
Corporations

- Tech dominates end of decade
- M&A activity peaked in 2021 with \$5.8 Tn in deal volume fueled by availability of cheap financing and competition from PE firms as well as strategic buyers
- High valuations make it more difficult for strategic buyers to justify rationale for acquisitions

This Time It's Different

2020-21 Federal Government Response

US Stimulus to Economic Crisis (\$ Bn)

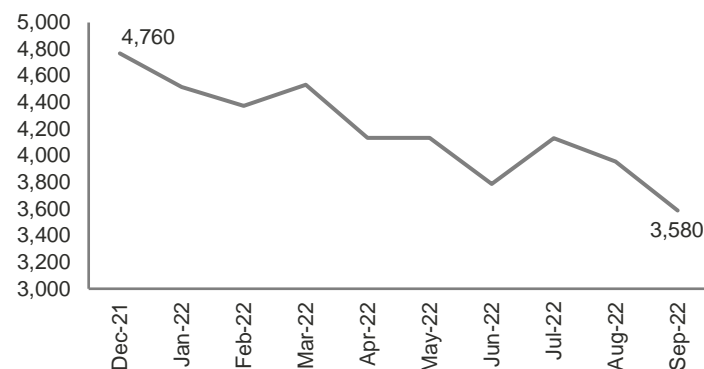


- Government response largest outlay in US history; larger than responses to the GFC and the Great Depression **combined**
- Direct payments to consumers had unintended effect of deterring job seekers

Different Root Causes and Effects



S&P 500



Impact on Select Groups



- 6.5 million lives lost from Covid
- Global shutdown of travel and the economy



- Distortions in demand (no historical precedent)
- Bullwhip effect in supply chain (dislocations)



- Inflation at highest levels since **1981**
- S&P down 23% in first 6 months of 2022; largest drop since **1932**
- Fed raises rates **six** times in 2022; **fastest rise in history**



- GDP fell by 8.9% (most in **70 years**)
- Companies institute Work From Home policies



- Unemployment increased to 13.0%
- Great Resignation

2022: Warning Indicators Everywhere

Intel: "Chip shortage will last through 2024..."



- Processor & chip supply chain issues impacting everything from cars to pacemakers
- Pricing distortions as inflation ripples through value chain



- Increased volatility – CBOE VIX at highest non Covid levels since GFC
- Retail investors pulling back
- Long overdue financial market correction
- Collapse of crypto



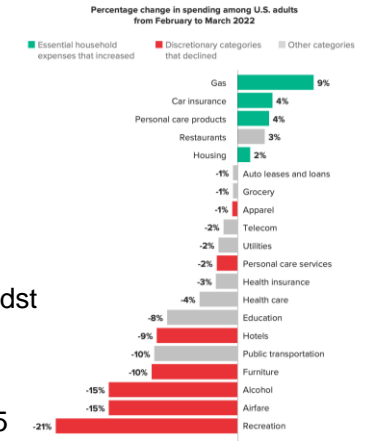
Alphabet: "We don't always have to equate having fun with spending money..."

- Bellwether earnings miss across almost every sector
- Layoffs of magnitude not seen in 20 years in tech; even longer across all industries
- Other...

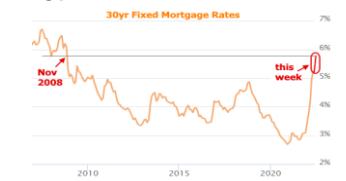


- Real consumer spending drop amidst high inflation levels
- Unsold home inventory levels at 15 year high

Discretionary Spending Plunged Lower in March

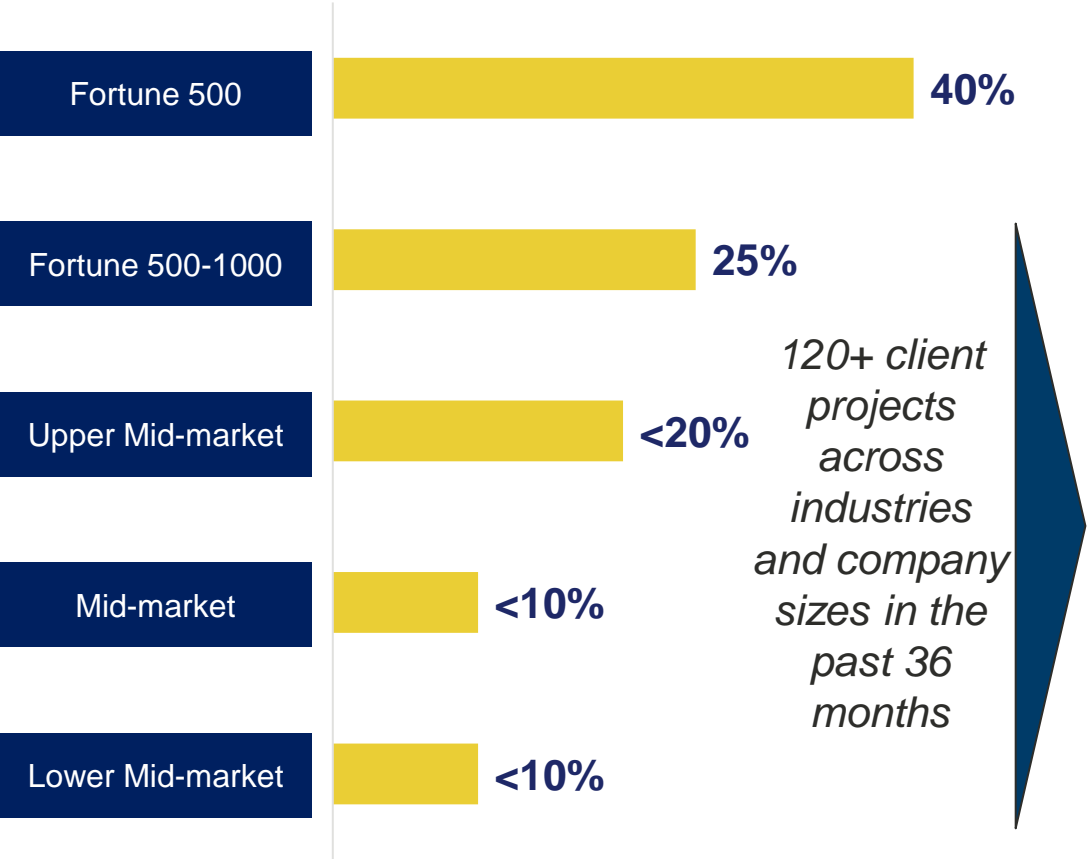


- Fed raised rates an unprecedented six times in CY2022 alone
- Mortgage rates exceed 7% for 30 year fixed for first time in 20 years
- Treasury rates at highest level since 2007

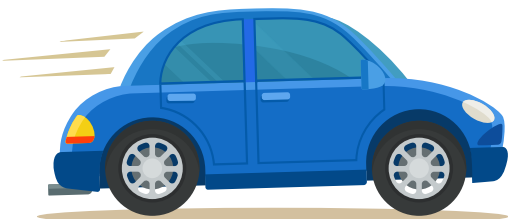


What are HPA clients focused on?

HPA Client Base



Most Requested Projects



2020 – 2021

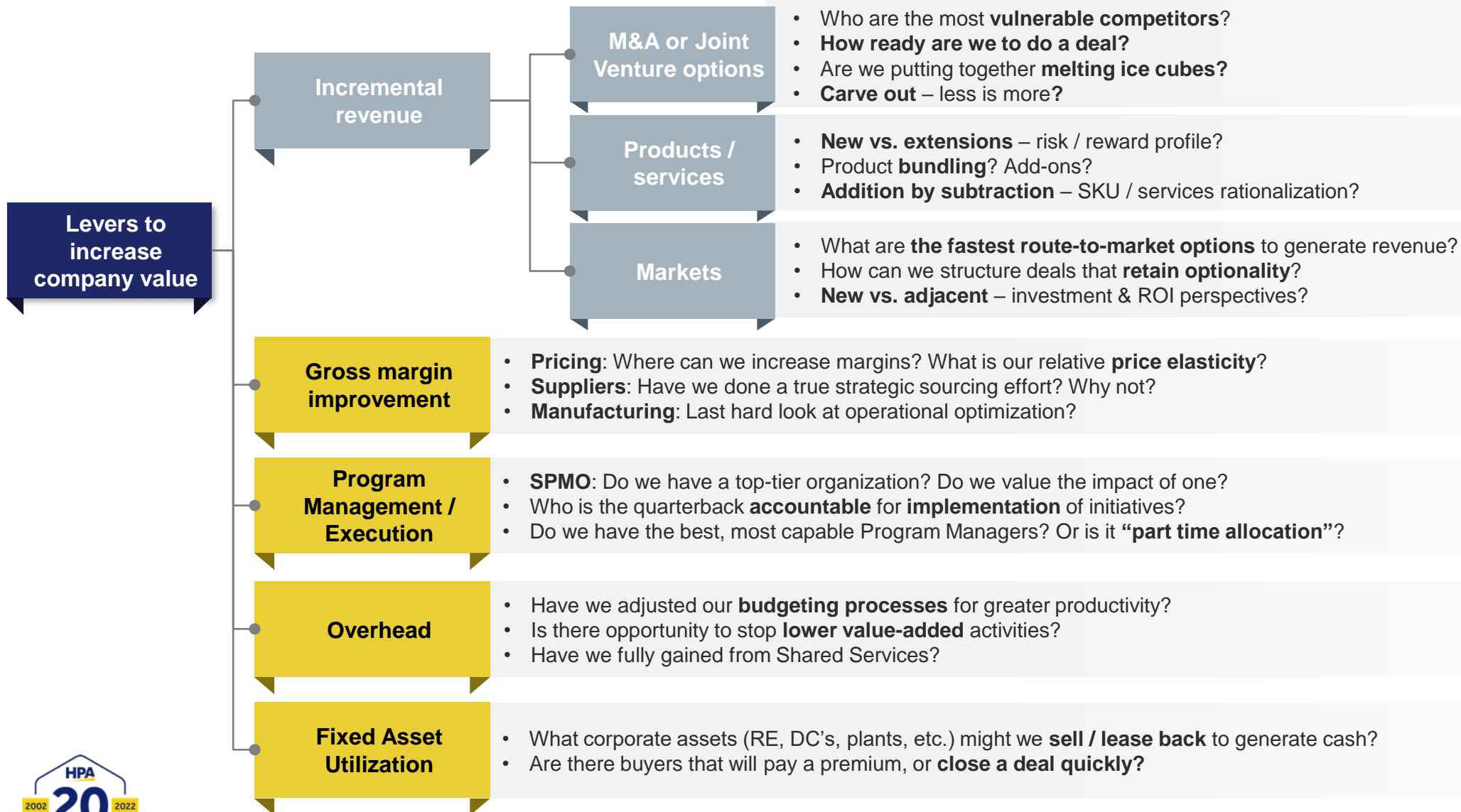
- **Growth (outward facing):** innovation and new products / services
- **M&A:** using high valuations as currency; multiple based accretion
- **P&L:** price optimization to take advantage of economic growth
- **Operations:** Future of work, WFH / hybrid teams, employee retention



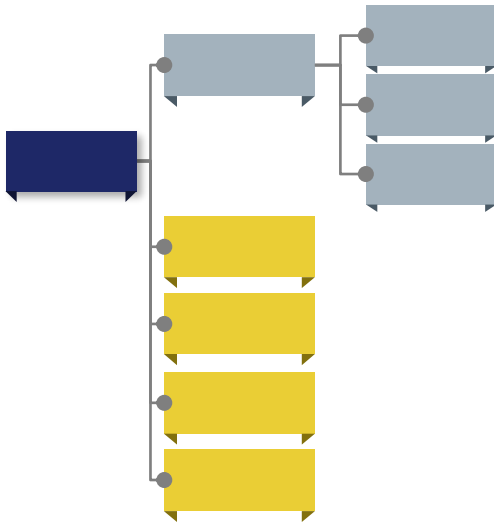
2022

- **Portfolio review (inward facing):** profit drivers, brand / SKU productivity
- **M&A:** extensive pre-deal planning to accelerate value capture
- **P&L:** Gross margin, COGS, vendor reviews, sourcing, logistics
- **Operations:** productivity & process improvements, strategic PMO to accelerate results

Have you asked the hard questions?



How do I decide where to focus?



Key Prioritization Considerations

- **Alignment**
 - Is Executive leadership in agreement on the **Top 3 challenges** facing the company?
 - Do we agree on the expected **outcomes**, **timing**, and **investment** requirements?
- **Balance Sheet**
 - What is our honest **financial state of health**?
 - **How will we fund** these efforts?
 - What **payback timeframe** is acceptable for us and our investors?
- **Resourcing**
 - What is our **internal capacity**?
 - Who can we **fully dedicate** to these efforts over an **extended period of time**?
 - What are the **impacts on existing “day jobs”** with re-allocation of internal resources?
- **Talent**
 - What is the **expertise level** of our people relative to these new areas of focus?
 - What are we as a company **good at and not good at**?
- **Appetite**
 - How excited are we to take on new initiatives?
 - Do certain ones fit more into our culture vs. others?
 - Is this something you could defer until 2024? What is the **risk of doing nothing**?

Appendix

HPA Leadership



Sumeet Goel
Founder & Managing Director

Sumeet founded HPA in 2002 and serves as the firm's Managing Director in charge of company strategy and client service delivery.

Sumeet has over 25 years of management consulting experience and has advised senior executives across industries, including financial services, real estate, technology, healthcare, consumer goods and media.

Prior to founding HighPoint, Sumeet served as Head of Strategy for Digital Media Campus, an early-stage venture firm that operated at the intersection of technology, media, and entertainment.

Before joining Digital Media Campus, Sumeet led efforts with dozens of clients across industry and functional sectors from McKinsey's New York and Los Angeles offices.

Sumeet holds an MBA from Harvard Business School and a BS from the Wharton School of Business.



Justin Moser
COO & Partner

Justin brings over 20 years experience leading and advising company growth strategy, operational improvement, and go-to-market optimization.

Prior to HighPoint, Justin served in executive leadership roles for Mattel, Inc. over a 15-year tenure from 2003 to 2018. Most recently, he was SVP / Group CFO, guiding the company through restructuring, high-yield debt capital raises, and revenue stabilization.

Previously, he headed Mattel's NA Online business, including its Amazon Sales team and internal e-retail operations, driving +25% annual segment growth. In addition, Justin led Corporate Strategy and brand marketing roles in multiple businesses, including the development and optimization of Asia-based sourcing.

Pre-Mattel, Justin served clients across industries from Bain & Company's Los Angeles office, and co-led Bain Ventures, Bain's early-stage business incubator.

Justin holds an MBA from the Kellogg School at Northwestern, where he was an Austin Scholar, and a BA from Pomona College.



Richard Berger
Partner

Since 2009, Richard has been a Partner with HighPoint Associates and leader of the firm's East Coast Practice.

Before joining HighPoint, Richard spent nearly 20 years in a variety of consulting, operating, and start-up leadership positions.

Most recently, he was a Principal at Katzenbach Partners, a boutique management consulting firm, where he led client engagements and developed new business in industrials, consumer, telecommunications, and financial services.

Before his time at Katzenbach, Richard led acquisition and consumer marketing for the largest customer segment within AT&T Wireless. His professional experience also includes leading consumer and customer development at Financial Engines, America's largest independent investment advisor, and brand management and finance roles at Procter & Gamble.

Richard holds an MBA from Stanford University and a BS from Washington University in St. Louis.



Senior Advisors

HighPoint is distinguished by the strength and commitment of our Senior Advisor group. With extensive industry experience and expertise, they are invaluable resources for our clients, providing thoughtful collaboration and partnership on projects at all stages.



Alex Nesbitt

Former Managing Director at the Boston Consulting Group who led the firm's West Coast Industrial Practice; founded a third-party logistics firm, sold to Ryder Logistics



Pamela Thomas-Graham

Former McKinsey Partner and senior executive at CNBC (CEO), Liz Claiborne (President), and Credit Suisse (Chief Marketing and Talent Officer); Board member at multiple public and private companies



Christian Frank

Former McKinsey Associate Partner who also served as VP for IBM's Healthcare Business Processes Group, and as VP of Corporate Strategy in charge of ADP's health and wellness strategy



Fiona Dias

Former senior executive at ShopRunner, GSI Commerce, and Circuit City; current Board member at Realogy Holdings Corp and Qurate Retail Group



Bob Kaplan

Former Director at McKinsey and head of the firm's IT and Systems Practice and Managing Partner of BCG's San Francisco office; has held multiple Board & C-level positions, including CIO of Silicon Valley Bank



Karen Schoen

Former Partner in Booz & Company's Healthcare and Financial Services Practice and senior executive at American International Group (AIG) and Bank of America (Countrywide Financial)



Katie Liebel

Former MD and Head of Strategy for JPMorgan Chase's Consumer Bank and Chief Strategy Officer at both Fifth Third Bank and Nationwide Insurance, where she also served as SVP of P&C Transformation



Phil Arrata

Former Associate Principal at McKinsey who then served as Chief Financial & Administrative Officer for Best Buy Canada and CEO of Mountain Equipment Co-op (MEC)



Cost Transformation



Christian Frank – Senior Advisor

Christian brings over 25 years of operating and strategy experience driving large-scale cost reduction, transformation, and growth strategy initiatives for both multinational corporate businesses and earlier-stage B2B growth firms.

He is a former Associate Partner at McKinsey where he led operational scaling, cost reduction, post-merger integration, and strategy development and implementation for a wide range of clients over 8 years.

Post McKinsey, Christian joined IBM, where he led their Healthcare Business Process outsourcing group following positions in Corporate and BU Strategy.

After IBM, he was Head of Corporate Strategy at ADP where led the development and launch of their business wellness strategy. Following ADP, Christian founded his own company, a provider of employee screenings for small & mid-sized businesses.

Christian has led or advised on a number of HPA cost reduction and transformation efforts, including driving G&A / CAPEX cost takeout for a publicly-traded healthcare services company, leading an OPEX cost reduction initiative for a hypergrowth supplements firm, advising on the stand up of an integration management office for a leading healthcare company to head pre-merger planning and PMI execution following a large acquisition.

Christian is a Fulbright scholar, and holds an MS in Computer Science from the University of Oregon and a BS from the University of Dortmund, Germany.



Andy Fennell – Project Leader

Andy is a senior consultant with deep experience driving cost reduction, growth strategy, and operational improvement initiatives for clients in the consumer and retail sectors.

Andy was trained as a strategy consultant at McKinsey before joining Dick's Sporting Goods as Director of Strategic Planning. At Dick's Andy reported to the CFO and led many of the company's most important strategic initiatives, including the launch of new business units and store concepts. Andy led Dick's space productivity efforts, resulting in significant changes in the allocation of both inventory and space within the store.

In addition to his retail experience, Andy gained significant product expertise as a Director of Global Strategy for NIKE. There, he partnered with the COO and President of Product Creation to launch Express Lane, a speed to market program that delivered new styles and additional units in under six months. Express Lane now represents ~20% of NIKE's revenues.

Select experience includes:

- Pursued over \$500M in incremental EBIT for multi-banner retailer as head of transformation office. Implemented financial tracking to ensure identified savings was realized in full and on time while building an internal transformation office to ensure sustainability
- Managed transformation for \$10B+ specialty retailer pursuing \$400M in incremental EBIT through improvements in COGS, supply chain, store labor, store portfolio, SG&A, and real estate, resulting in selection for international rollout
- For Dick's, created box productivity program that increased the flex in seasonal floor plans resulting in \$40M in incremental EBIT

Andy holds an MBA from Michigan's Ross School of Business, and a BS from Grove City College.

M&A Integration



Khaled Haram – Senior Advisor

Khaled brings over three decades of operational and strategic experience as a former consulting Managing Director and Partner, as well as C-suite executive for public and private companies. He has been involved in numerous performance improvement, restructuring, carve-out, and integration efforts both as an advisor and operating executive.

Khaled was Managing Director for the Private Equity and M&A practices for PwC, FTI, and CBIZ. For PwC, he focused on PE clients and held responsibility for identifying and delivering value capture initiatives throughout the deal continuum as a result of mergers, acquisitions, and divestitures. At FTI, Khaled built the Retail & Consumer Practice with two other partners from 3 to over 24 individuals in less than two years.

He earlier held a role as the President & COO of Lighting Science Group, a Pegasus Capital portfolio company, where he headed Finance, IT, and all operations. Khaled also held roles as CIO and CFO at Handleman, a CPG distribution company where he worked closely with investment bankers to package the company's last two acquisitions for carve out transactions.

In his work as an independent consultant, Khaled worked for a PE firm merging two media companies and led multiple work streams prior to the close of the transaction. Additionally, he led the Project Management Office for six months post-closing. In this role, he managed projects across 12 different departments including Sales, Marketing, Operations, HR, IT, and Corporate to ensure a smooth transition to the combined entity and served as the interim CFO to ensure timely SEC reporting and upgrade the skills of the Finance organization.

Khaled holds an MBA in Finance from NYU's Stern School of Business, a BEE from Cooper Union School of Engineering, and a BS from NYU.



Stephen Ashford – Project Leader

Stephen has 20 years of strategy and operations experience driving large scale programs in transformation, post-merger integration, M&A, and change management across industry sectors.

He is a former McKinsey Associate Partner and leader in the firm's Operations practice where he led strategy, Lean transformation, post-merger integration, and operations excellence efforts. Stephen then moved to United Technologies as Director of Business Development where he led strategy and M&A and managed a multibillion-dollar post-merger integration initiative that formed a new division.

After United Technologies, Stephen joined Capital One as a Senior Director of Process Excellence. His more recent roles include VP of Program Management at CSC Service Works, a private equity owned consumer service business, and Chief Transformation Officer at Club Corp, a private equity-owned private clubs and lifestyle business.

Select experience includes:

- Drove merger of a \$2B specialty chemicals company with an \$800M competitor, capturing \$90M in synergies through cost reduction and product portfolio enhancement. Led efforts to maximize talent retention and create a "best of both cultures" with a common operating system
- Led PMI of Kidde and Redhawk into UTC Fire & Security to build a \$3.5B company to \$9B. Coordinated 30 separate integration projects including branch consolidation, manufacturing, outsourcing, divestiture of non-core businesses, and product design consolidation. Captured \$140M in synergies
- Led \$1B healthcare firm's end-to-end care and back-office transformation to compliance green, with 10% efficiencies in parallel

Stephen holds a PhD in Physics from University of California, Berkeley, and a BA and MA in Natural Sciences from Cambridge University.

PMO | Execution Acceleration



Alex Nesbitt – Senior Advisor

Alex leads HPA execution acceleration efforts with over 25 years of experience advising companies on issues of strategy, growth, efficiency, organizational structure, operational improvement, and mergers & acquisitions.

After leaving BCG, he founded Sameday Technologies, a provider of supply chain technology, third party fulfillment services for B2B time critical parts and components serving the aerospace, telecom, medical equipment and other industries before selling the fulfillment operations to Ryder Logistics.

As a Senior Advisor, Alex has counseled C-Suite executives and led corporate and business unit strategy development, go-to-market strategy creation, and transformational initiatives for clients including publicly traded utilities, automotive companies, and industrial goods manufacturers and distributors.

Alex has stoodup and led program management offices to drive numerous large-scale initiatives for clients across industries. He recently led an HPA initiative for one of the largest public utilities in the US that wanted to undergo a digital transformation to become the first end-to-end digital authority in the space. As part of the effort, the HPA team assessed the company's current digital capabilities prior to developing a roadmap and establishing a digital transformation PMO, and subsequently leading implementation of the plan over the next 14 months.

Alex graduated with a BS in Industrial Engineering from Stanford University.



Chris Fox – Project Leader

Chris is a senior consultant and advisor with a wealth of experience in strategy, operations, and program management across the consumer, entertainment, healthcare / life sciences, and industrials sectors.

Chris started his career at Marakon Associates before moving on to McKinsey, where he stayed for seven years and was an Associate Partner in the firm's Corporate Strategy & Finance Practice. He would later become Director of Business Strategy at Xerox before going back to Marakon as a Principal leading both strategic and operational engagements for corporate and private equity-sponsored clients. His most recent corporate role was as Vice President of Corporate Strategy for WestRock (fka MeadWestvaco), a Fortune 500 global packaging solutions company.

Select experience includes:

- For a \$1.3B PE-backed consumer client, built a PMO capability (tools, processes, governance, and new hires) and led high-value strategic projects to transform the organization and drive performance improvement
- For the world's largest live entertainment provider, supported the development of a new global security organization; oversaw a team of 4 focused on (a) project prioritization, (b) execution support on specific initiatives, and (c) organization development; later transitioned to an interim Chief of Staff role
- At WestRock / MeadWestvaco, led the corporate strategy team (10 FTE), accountable for aligning the enterprise against corporate, SBU, and regional strategic priorities. Oversaw the evergreen identification, resourcing, and execution of specific high-value-at-stake strategic initiatives including organic growth, turnarounds, acquisitions, and divestitures. Drove portfolio strategy and transformation and evaluated the potential of existing and new businesses and technologies. Led complex programs, e.g., diligence, execution, and post-merger integration for high-profile acquisitions, including coordinating functional teams, external advisers, and business sponsors

Chris holds an MBA from The Wharton School, and a BA from Harvard University.

Representative Client Engagements – Cost Transformation

	Client Need	Engagement Outcome
Cost Transformation	International publicly traded gaming technology and products company was looking to cut costs, reduce expenses, and streamline processes in their North American division over the next twelve months	Led cost reduction, process redesign, and organizational restructuring initiatives. Used multi-step, three-phase approach, to understand the current and future needs of the company's business units, conducted stakeholder interviews, analyzed IT systems, validated business plans, held workshops, and designed and tested a new operating model that included streamlining the order-to-cash process. Resulted in identification of initiatives required to transition to the new operating model, plus implementation roadmap which company executed against
Turnaround Cost Takeout Growth Strategy	Publicly traded, healthcare services firm needed a comprehensive enterprise transformation strategy centered on rapid turnaround of underperforming locations and G&A/Capex cost takeout, repositioning the organization for long-term growth	Partnered with CEO and leadership team to stand up Transformation Office. Oversaw initiative process design, execution, and change management. Defined standard care delivery model and worked with care-specific teams to assess model compliance and develop actions to close organizational gaps. Designed and led Clinical Value Initiatives (CVI) for higher topline sales, attendance, and effective inpatient decision-making process. Cost takeout team realized savings by defining G&A cost levers and implementing rapid cost takeout initiatives
Cost & Operations Transformation	Rapidly growing \$1.5B B2B marketing company was experiencing YoY EBITDA decline. Company wanted to determine the cause of the decrease and implement a large-scale cost reduction and process improvement effort	Evaluated previous cost savings initiatives and led process to identify additional opportunities. HPA team identified cost optimization opportunities and developed metrics to monitor progress and savings, increased budget accountability and enhanced use of analytics resulting in bottom-line impact of \$30M on \$200M of in-scope spend.

Representative Client Engagements – M&A Integration

	Client Need	Engagement Outcome
Pre-Merger Planning Office Stand Up	Industry-leading, healthcare services organization had entered into a definitive agreement to make a large-scale acquisition and sought outside help standing up an Integration Management Office to head its pre-merger planning, transitional support functions, and PMI execution	Partnered with the executive leadership to design and standup the Integration Management Office, and develop and rollout standardized pre-merger planning, reporting, and analytic frameworks to each of the 5 areas and 8+ functions involved in the merger. Provided weekly PMO leadership over the pre-merger and early PMI cadence, highlighting areas in need of greater resourcing, and troubleshooting key functional needs. Merger proceeded ahead of schedule and team left a fully functioning IMO in place to complete the final PMI steps
Post-Merger Integration	Global CPG company had completed a growth acquisition of a high-tech firm and needed a resource to develop and implement an integration management structure, drive internal decision-making, and advise on the integration	Designed an integration methodology to meet quarterly revenue targets, enable the manufacture of products in time for the holiday season, and achieve business stabilization goals before defining roles and responsibilities across the client's business and setting up a control structure to drive accountability and fact-based decision-making. HPA consultant addressed key priorities and transitioned integration process to internal client stakeholders
PMI Product Integration	PE-backed SaaS company in the education space acquired a large competitor and needed assistance with product integration into the existing portfolio, particularly in the areas of pricing, cross sell, LTV and churn reduction	Developed a fact-based understanding of the acquired product's position in the marketplace through qualitative interviews with product users, reviews of all existing pricing and customer data, elasticity analysis, and research on competitor pricing strategies. Developed pricing insights, which they then refined through a series of internal and external interviews, modeled various approaches to pricing through both B2B and DTC channels, and designed and implemented a targeted testing strategy for the different pricing models

Representative Client Engagements – PMO | Execution Acceleration

	Client Need	Engagement Outcome
Interim PMO New Product Launch	Publicly traded leading payment cards company was looking for interim PMO Support for business banking checking product launch	Provided leadership for PMO in areas of product design, customer experience, go-to-market planning, operations, and other supporting functions. Also coordinated workstreams, ensuring required deliverables and timelines were met, identifying gaps / risks of execution. Integrated workstream efforts into updates for Steer Co, driving resolution of key issues and interdependencies
PMO Execution Acceleration	Fortune 500 media & entertainment technology company was in the process of developing a new global function but lacked the internal capabilities to execute on multiple high-value efforts as part of the larger initiative	Focused on prioritizing a portfolio of early stage, in-flight projects. Provided execution support on select, high-value efforts including the development of core processes, technology infrastructure, training, risk mitigation, and market intelligence. Helped build new, functional global organization, whilst leading change management activities and keeping initiatives on track with organizational buy-in. HPA lead initially acted as Chief of Staff before eventually recruiting and transitioning responsibilities to a full-time hire
PMO Digital Strategy Implementation	One of the largest public utility organizations in the U.S. required assistance establishing a PMO and leading implementation of a roadmap to become an end-to-end digital authority	Using roadmap and organizational framework created by another HPA team, the PMO lead created and stood up the internal organization, mapped and defined roles and responsibilities of internal stakeholders, and acted as the day-to-day lead. To achieve the required future-state, HPA consultant managed the completion of workstreams against deadlines, whilst also updating client sponsor and presenting to the organization's senior executives



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