



# Introduction to HighPoint Associates

July 2025



# HighPoint Associates (HPA) is a strategy and execution acceleration partner that helps leaders get the right things done quickly



## Our Legacy

For over 20 years, HPA has supported clients with our **flexible, results-focused approach** to consulting



Our consulting team is **800+ strong**; they are alumni of **top-tier consulting firms** who also have extensive operating experience



This unique combination of talent allows us to provide **practical strategy solutions and hands-on acceleration**, without conforming to inflexible team structures and pricing

## What this means for your company

### Tailored Engagement

A curated approach based on a nuanced understanding of your specific situation; we engage the right team at the right time without 'off-the-shelf' solutions

### Deep Experience

We have a proven track record solving strategic and execution challenges within and alongside top-performing organizations

### True Collaboration and Change Management

We prioritize ownership and team alignment to drive lasting change—not just the next project

## Our Differentiators



### Talent

Our teams bring strategic thinking and a real-world mindset to problem-solving from their decades of experience as consulting and operating leaders



### Flexibility

We adapt our level of involvement—from time and resources to subject matter expertise—and adjust as the needs evolve



### Value

Pairing experienced, high-impact talent with a nimble, tailored approach to team staffing delivers value to our clients through a more efficient cost structure

# Meet the leadership team—your trusted partners from strategy through execution



**Sumeet Goel**  
Founder & Partner

Sumeet founded HPA in 2002 and serves as the firm's Partner in charge of company strategy and client service delivery. He has over 25 years of management consulting experience and has advised senior executives across a range of industries, including financial services, real estate, technology, healthcare, consumer goods, retail, 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. He also 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**



**Justin Moser**  
COO & Partner

Justin brings over 25 years of 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. Those roles included SVP / Group CFO, head of Mattel's NA Online business, and Corporate Strategy and brand marketing roles in multiple businesses. As Group CFO, guided the company through restructuring and revenue stabilization.

Pre-Mattel, Justin served clients across industries from **Bain'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** and a BA from **Pomona College**



**Richard Berger**  
Partner

Richard has been a Partner with HighPoint Associates leading strategy, operational, and marketing initiatives since 2009.

Before joining HPA, he was a Principal at **Katzenbach Partners**, a boutique management consulting firm, where he led client engagements 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 and brand management and finance roles at **Procter & Gamble**.

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



**Kristel Kurtz**  
Partner

Kristel is a Partner with HighPoint Associates bringing over 25 years of experience in strategy, growth, and operations.

She spent 19 years at **Accenture** in the Strategy and Consulting Practices, advising clients on market entry, sales force optimization, restructuring, and M&A integrations. Kristel also served as Managing Director and CFO at **Third Sector Capital Partners**.

Most recently, she was Partner at **Cherry Bekaert** and previously **SBI**, where she worked with C-suite executives on strategic initiatives, M&A, and operational transformations across B2B industrial, healthcare, and technology sectors.

Kristel holds an MBA from the **MIT Sloan School of Management** and a BS from **Wellesley College**

# Senior Advisors bring experience across industries and core functions

HPA is distinguished by the strength and commitment of our Senior Advisor group, who 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



## Meka Millstone-Shroff

Former President & COO of Buy Buy Baby, Chief Customer Experience Officer for Bed Bath & Beyond, and McKinsey Consultant; Board Member at 6 companies including Neiman Marcus, Halo Dream, and Athletico



## 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



## Dino Mauricio

Former Managing Director at KPMG and General Electric with 30 years of expertise in M&A and transformation; has held additional roles as CEO of Ducker Carlisle, COO at Brock Capital, and SVP at Berkshire 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 CEO for Motif, Inc.



## Diana Dosik

Former Boston Consulting Group Partner in the firm's People & Organization / Healthcare Practices with an additional depth of experience across financial services and CPG



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

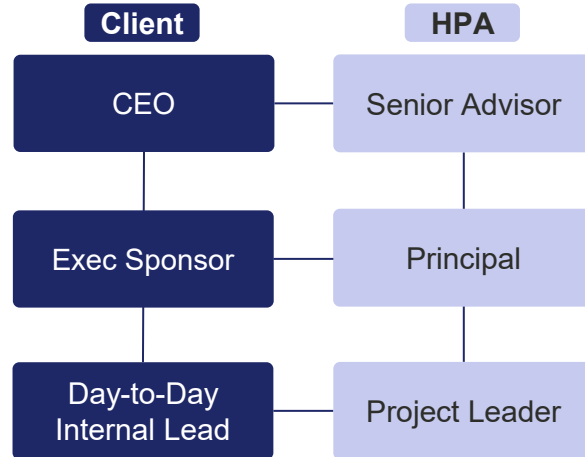


# Our business model enables us to flex capacity and right-size our team to your needs



## Full Team

For large-scale, multi-phase initiatives...



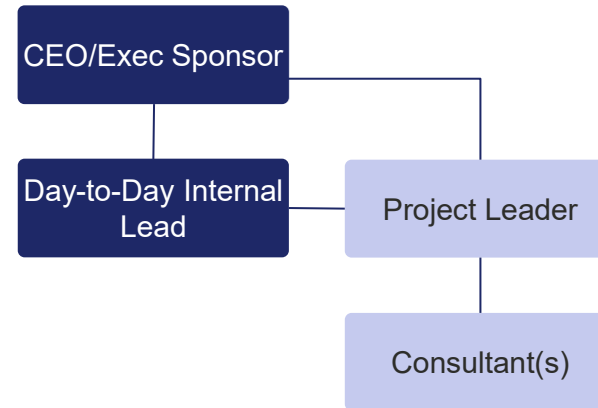
- **Senior-led, end-to-end delivery model** with dedicated oversight and continuity
- **Complex, enterprise-wide initiatives** that require depth, scale, and long-term engagement

**Organizational effectiveness and cost reduction** for a global consumer services company



## Teamlet

For rapid mobilization on critical projects...



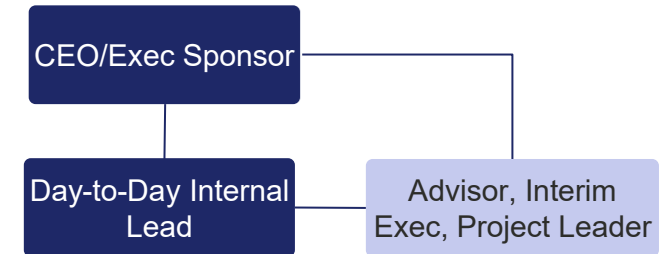
- **Flexible, high-impact model** that's easy to scale and re-deploy
- **Ideal for focused projects or as embedded execution support** within broader programs

**Transformation Office stand up** for a \$2B PE-backed B2B SaaS company



## Individual

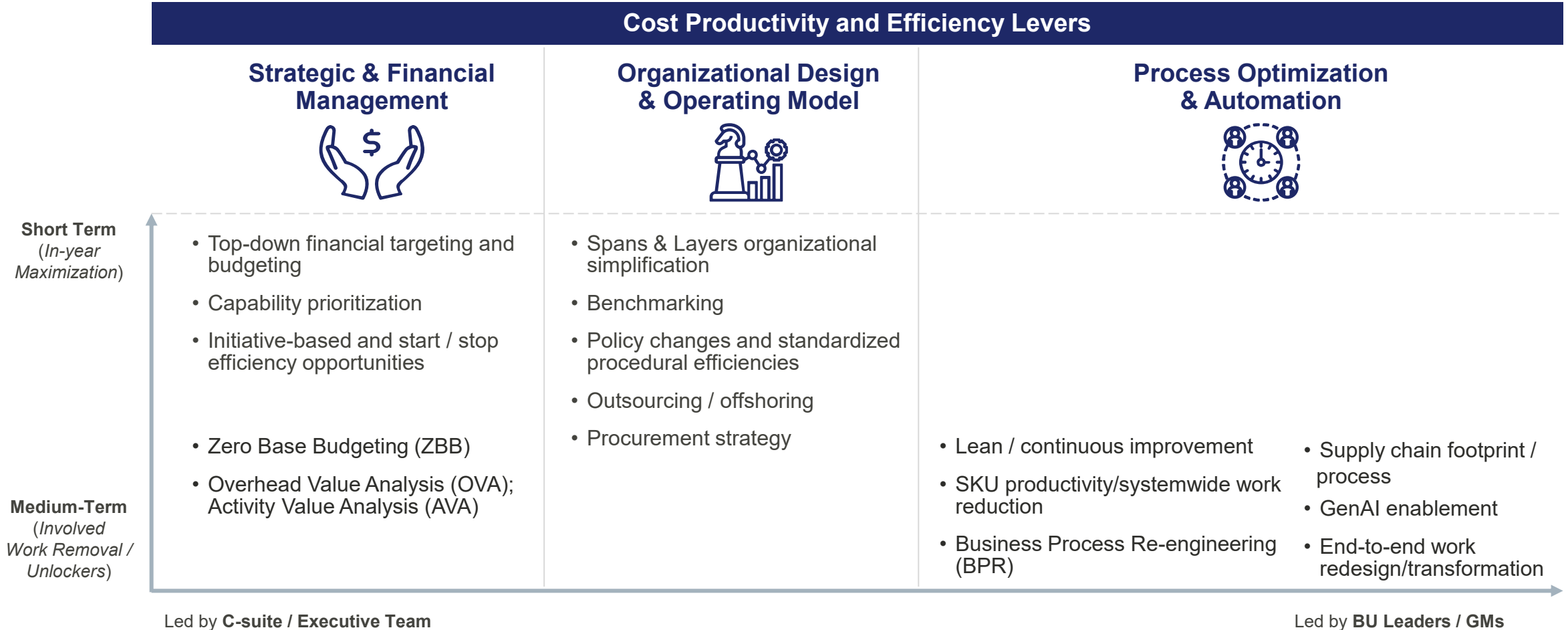
For targeted / interim needs...



- **Expert-driven, plug-and-play solution** tailored to specific needs
- **Advisory support, interim roles, or targeted functional expertise**

**Cost reduction opportunity identification** for a publicly traded technology company

# Together we pull cost productivity and efficiency levers to reach impactful outcomes



# Our teams tailor their strategic recommendations to each client's specific needs

## Example strategic recommendations



### Restructuring

- Ensure each function has one thick and one thin layer; use Funnel, Necktie, or Beaker models
- When consolidating BUs, consider Shared Services, matrixed setups, and CoEs/CoPs
- Align on strategy first; once structure is defined, execute changes quickly
- Pressure test next-layer changes before rolling out (i.e., “run water through the pipes”)
- Maintain a change team for 18–24 months to track progress, resolve issues, and communicate



### Spans & Layers

- Use an aspirational organizational framework as a guiding model
- Define clear, rigorous standards for leveling (e.g., direct report counts)
- Establish transparent rules for when span exceptions are allowed
- Create a distinct career path for senior Individual Contributors/SMEs
- Review spans every 18–24 months; cap Director/VP roles to prevent inflation



### GenAI Enablement

- Early implementation can drive value, even before GenAI is fully performant
- Value capture timing matters; delivery curves are often nonlinear
- Estimate GenAI impact by function, role, tenure, and employee capability
- Efficiency gains may falter if headcount cuts follow a linear model
- Identify opportunities to upskill/reskill employees to optimize GenAI usage and maximize productivity gains

# Recent client examples of enterprise transformation at scale

Transformation Strategy	Client Need	Engagement Outcomes
	<p>Private equity-backed healthcare services company required an <b>integrated enterprise transformation strategy and roadmap</b> across operations, processes, IT, pricing, and delivery to address challenges from years of aggressive acquisition strategy without proper integration execution</p>	<ul style="list-style-type: none"> <li>Utilized a twofold approach focusing on field operations and corporate functions</li> <li>Conducted a detailed financial analysis at site level to understand drivers of profitability, identify best practices and segment sites by archetype to develop tailored improvement programs and roll out pilots for underperforming sites</li> <li>Conducted a diagnostic assessment of end-to-end processes, org structure, tools, technologies and KPIs</li> <li>Defined org and ops footprint aligned to strategy; mapped implementation and change roadmap across tools, resources, and governance</li> </ul>
Operating Model Optimization	<p>Global consumer services company had recently begun to centralize its HR, IT, insights &amp; data, marketing, and other back-office functions with mixed results, and needed to <b>transform its operating model by optimizing organizational effectiveness while at the same time reducing costs</b></p>	<ul style="list-style-type: none"> <li>Built fact base behind organizational G&amp;A spend and assessed Center Of Excellence model maturity, focusing on flawed interactions and support between the central functions and business units</li> <li>Diagnosed resource and process inefficiencies; defined governance, right-sized functions, outlined capability needs, and tiered service levels</li> <li>Delivered a to-be model and recommendations that cut &gt;10% G&amp;A and enabled scalable growth, agility, and process clarity</li> </ul>
Multi-site Transformation Strategy	<p>Publicly traded, multi-site hospitality services firm needed a comprehensive enterprise transformation strategy centered on <b>rapid turnaround of underperforming locations and G&amp;A/Capex cost takeout, repositioning the organization for long-term growth</b></p>	<ul style="list-style-type: none"> <li>Partnered with CEO and executive leadership team to stand up Transformation Management Office and oversaw initiative process design, execution, and change management</li> <li>Defined standard care delivery model and worked with care-specific teams to assess model compliance and develop actions to close organizational gaps</li> <li>Designed and led Clinical Value Initiatives (CVI) for higher topline sales, attendance, and effective inpatient decision-making process</li> <li>Realized savings by defining operational excellence and G&amp;A cost efficiency levers and implementing rapid cost takeout initiatives</li> </ul>



## “4 Walls” Diagnostic Framework



## Fast-Track Cost Wins

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## Site Segmentation by Margin



## Execution Scorecard

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## Enterprise Cost Levers

## PRELIMINARY

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## Field Ops Dashboards & Playbooks

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# Recent client examples of **efficiency** through cost takeout and L2C optimization

	Client Need	Engagement Outcomes
<b>Org Redesign &amp; Cost Takeout</b>	Global consumer products company was looking to <b>cut costs, reduce expenses, and streamline processes</b> in their North American division over twelve months	<ul style="list-style-type: none"> <li>• Led cost reduction and restructuring effort, redesigning org model and operating rhythm to support transformation</li> <li>• Conducted cross-functional workshops and stakeholder interviews to identify process inefficiencies and risk areas</li> <li>• Redesigned target operating model, enabling a shift to the new business structure with reduced complexity</li> <li>• Delivered execution roadmap, aligning implementation milestones with identified cost and efficiency levers</li> </ul>
<b>Lean Operating Model</b>	Publicly traded technology company was moving in a new strategic direction and needed assistance <b>identifying opportunities for cost reduction</b>	<ul style="list-style-type: none"> <li>• Developed comprehensive cost model across personnel, real estate, IT, and product spend to identify short- and mid-term savings</li> <li>• Assessed organizational structure, roles, and decision rights to uncover hidden cost drivers and optimization levers</li> <li>• Supported sale preparation, working with management and the Board to prepare the entity for strategic exit</li> </ul>
<b>L2C Transformation Office</b>	A \$2B PE-backed B2B SaaS company with slowing sales tapped HPA to <b>stand up a Transformation Office, diagnose inefficiencies in the Lead-to-Cash (L2C) process, and accelerate quick wins</b> to unlock resources and reduce costs	<ul style="list-style-type: none"> <li>• Mapped lead-to-cash (L2C) process, identifying critical pain points through interviews and value stream analysis</li> <li>• Designed cross-functional solution roadmap, addressing root causes with integrated, system-wide fixes</li> <li>• Enabled prioritization of initiatives, using effort/impact lens to align stakeholders around execution focus</li> <li>• Accelerated execution of quick wins, reducing resource strain and capturing near-term cost savings</li> </ul>

# Sample output from recent **efficiency** engagements (1 of 2)

Recent client examples include benchmarking, spans and layers analysis, and decision rights (RACI)

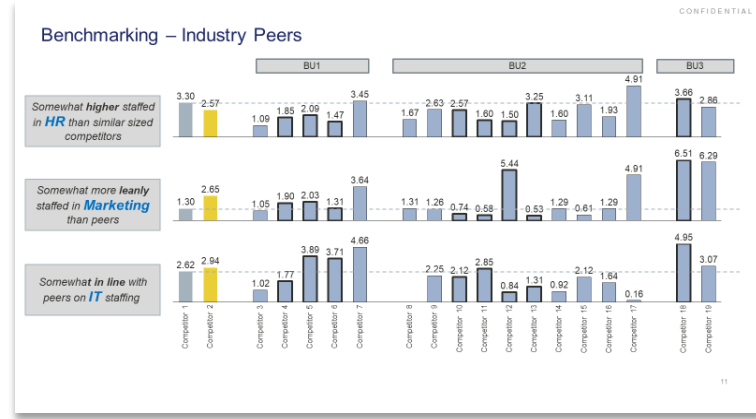
## Overhead Efficiency Opportunities

Function 1 Efficiency Opportunities

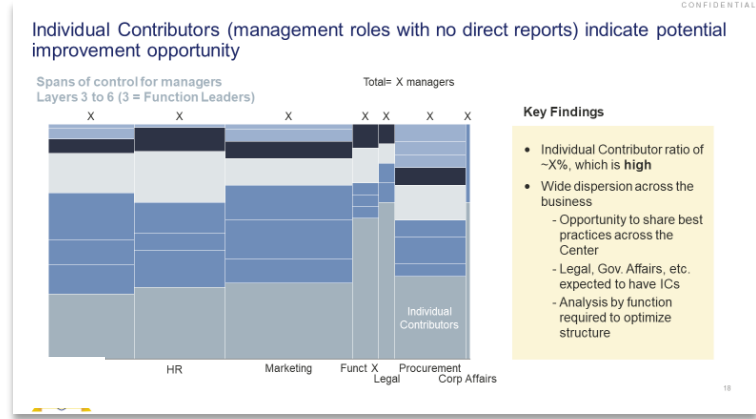
#	Lever	2023 Plan	Opportunity Range	Opportunity Risk	Opportunities
1	RM	Total: \$XM	\$XX (subs) to \$XM	Low	<ul style="list-style-type: none"> <li>Some subsidiaries are building tactical client service analytics groups that overlap with center-based RM.</li> <li>Duties coverage is broader in scope than RM pricing or yield.</li> <li>Target opportunity \$XX up to \$XM</li> </ul>
2	MC	Total: \$XM	\$XX to \$XX (net) - X% to X% reduction in unallocated center spend	Low	<ul style="list-style-type: none"> <li>Reallocation of resources to subsidiary discretionary spend on third party agencies, with a smaller center of best practices and corporate guidance</li> <li>Subs to be assigned budgets for use of third-party agencies at assumed \$XX to \$XX per sub.</li> <li>Target opportunity net \$XX to \$XX (X% to X% of non-allocated Center spend, offset by agency budgets)</li> </ul>
3	BD	Total: \$XM	Range dependent on strategic decisions - \$XX to \$XM	Medium	<ul style="list-style-type: none"> <li>Rationalization of RFP efforts due to capital constraints - reconcile activities to budgeted potential; fewer leads / smaller PMO with finance support</li> <li>Streamlining and focus of efforts on higher likelihood Win opportunities, to increase success rate and filter the quality and potential of the development funnel.</li> <li>Target range ~\$XX to ~\$XM (assumes range of X to X% of Plan spend)</li> </ul>
4	HR	Total: \$XM	\$XM to \$XM (seek some savings offset of current shadow spend in subs/sites)	Medium	<ul style="list-style-type: none"> <li>Stop Doing areas, e.g., EVP, Training, Employee Satisfaction; Narrow focus / resources on HR enterprise initiatives that do not directly support 2023 Plan; FTE time/activity allocations TBD</li> <li>To offset and recoup a portion of the \$X-XM in shadow spending on subsidiary P&amp;Ls now deployed to maintain X-X site coordinators covering gap work formerly handled by intels</li> <li>Target range \$XM to \$XM</li> </ul>

Target Range: ~\$X - \$YM

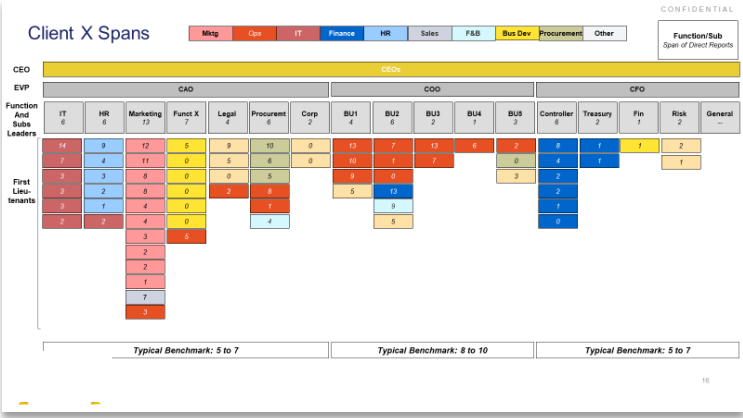
## Industry Staffing Benchmark



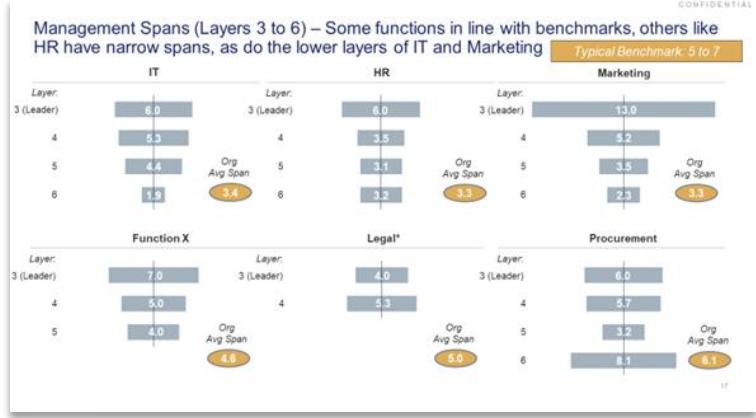
## Functional Role Mapping



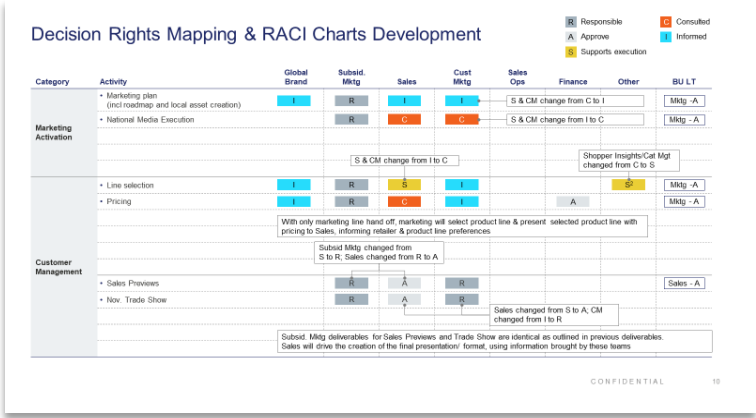
## Spans & Layers Review



## Span-of-Control Analysis



## Roles & Decision Rights Mapping

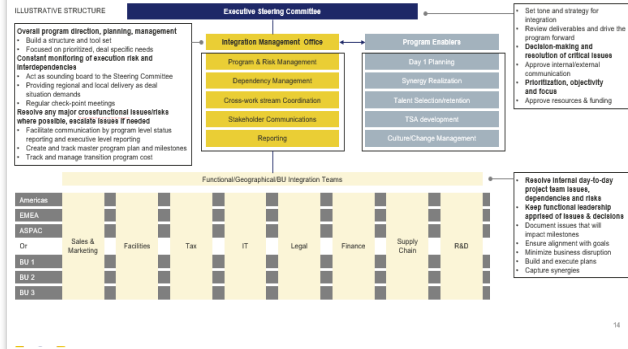


# Sample output from recent efficiency engagements (2 of 2)

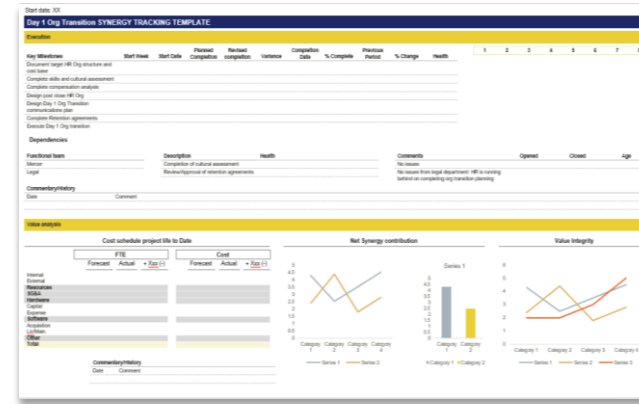
Recent client examples include organizational redesign, transformation office, and cost takeout

## Structure & Governance

### Structure and Governance

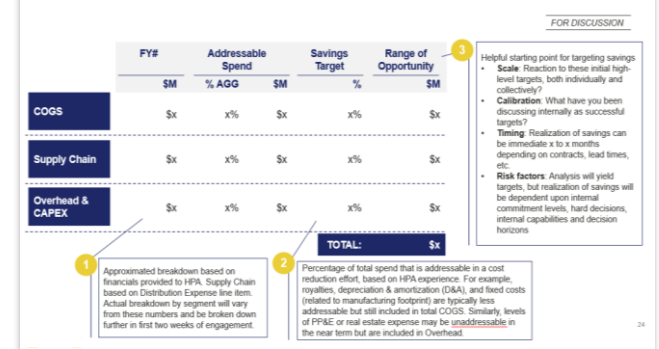


## Day 0 Tracking Dashboard



## COGS & CAPEX Savings Levers

Co has significant savings potential based on similar HPA efforts



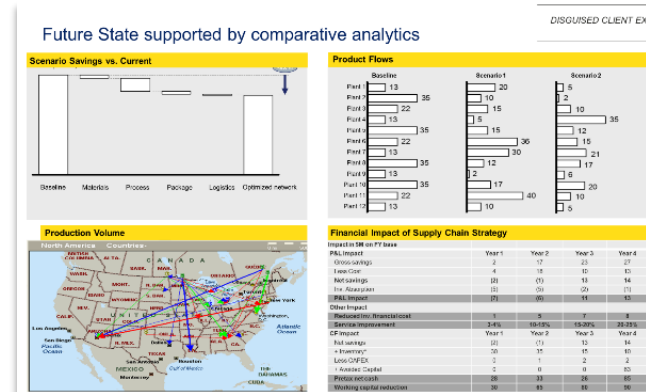
## IT Savings Opportunity

## Future-state Blueprint

**IT Opportunity Summary**

Sourcing Lever	Lever Detail	Vendor	Addressable Spend	Savings Estimate
				L - H
Cloud Optimization	Leverage pre-committed volumes to receive preferred pricing	X	1.6	0.05 - 0.08
	Evaluate usage, ecosystem design and multi-cloud strategy; architecture changes to reduce consumption	X	1.6	0.08 - 0.24
Competitive Bidding	Re-spec peripheral usage across corporate and resorts, develop catalogues	X	7.9	0.08 - 0.24
	Identify demand and/or usage from outside preferred channels, implement controls	X	7.9	0.16 - 0.32
In-Sourcing Data Engineering	Consolidate volumes and competitively bid IT supplies contract	X	7.9	0.16 - 0.40
	Data engineering strategy, in-sourcing/out-sourcing mix, low-cost alternate locations	X	1.3	0.10 - 0.26
Call Center Software Optimization	Evaluate usage, cost structure with reference to variability, negotiate in-line with HCL	X	0.45	0.02 - 0.05
License Re-harmonization	Evaluate enterprise-wide software usage, decommission unused systems, harmonize licenses to minimize true-up risk	Various	3.6+	0.36 - 0.72
Price Unbundling/Benchmarking	Direct/targeted negotiations	X	TBD	TBD - TBD
System Consolidation	Volume leverage and efficiency gains from system consolidation efforts	Various (RTP)	NA	TBD - TBD
<b>Total</b>				<b>1.01 - 2.29</b>

**PRELIMINARY**



## Project Charter for Future-state

**Finance Team Charter**

Team Lead (s)	Team Resources (Buyer)	Team Resources (Seller)
<b>In Scope</b>	Financial reporting; Management accounting; Internal Audit (SOX & IFRS); Financial Systems (AP, AR, GL); Tax; Budgeting & Forecasting; Treasury	
<b>Out of Scope</b>	Payroll	
<b>Mission/Objective/Decision</b>	<ul style="list-style-type: none"> <li>To put into place the appropriate financial measures to gain control of the business on Day 1</li> <li>Develop a robust integration plan to eliminate and integrate duplicate financial functions and centralize accounting operations</li> <li>Internal management reporting and external financial reporting will be converted to the Buyer's systems and processes</li> <li>Treasury functions will be centralized at corporate, and Target's systems converted to Buyer's</li> <li>Consolidated financial systems (BS and IS), including inter-company and hedging will be reported per IFRS standard</li> </ul>	
<b>Critical Areas of Integration Focus</b>	<ul style="list-style-type: none"> <li>Speedy operational and functional consolidation on end-state for each finance and accounting process and develop work plan to achieve</li> <li>General Ledger and Chart of Accounts mapping by Day 1</li> <li>Interface to allow check printing operation print all New Co's checks at close</li> </ul>	
<b>Key Dependencies</b>	<ul style="list-style-type: none"> <li>HR - Communications strategy and material, organization design; Restructure policy and retention success policy</li> <li>IT - Finance systems review and integration option analysis</li> <li>Operations - New pricing structure</li> </ul>	
<b>Anticipated Value Sources</b>	<ul style="list-style-type: none"> <li>Consolidate duplicate financial functions and centralize accounting operations</li> <li>Reduce external spending by eliminating or reducing redundant corporate expenditures including audit</li> </ul>	
<b>Key Risks</b>	<ul style="list-style-type: none"> <li>Retention of key personnel and loss of knowledge if key Target resources are not retained</li> <li>Appropriate level staffing maintaining effective balance for Buyer team leads between day-to-day operations and integration program</li> </ul>	



# Explore how our thought leadership drives successful outcomes

## Strategy



Success Factors for Acrobatic Strategic Planning



Bridging the Gap: From Strategic Vision to Operational Reality



Keeping the Pace: Planning in Hypergrowth Companies

## Mergers & Acquisitions



Get Beyond the Bidding War with Proactive M&A



Why Intentions Matter in Making Mergers Work



Small Acquisition, Big Deal

## Execution Acceleration



The Power of a Strategic PMO



Accelerate and Scale Your Most Important Initiatives, Efficiently



Keep the Change: Making Business Transformations Work



Change that Sticks: Overcoming Organizational Resistance to Change

## Transformation



Business Transformations are Trending. Here's Why...



HPA's Transformation Highlights



Five Keys to Powering Your Transformation Effort

## Organizational Optimization



Simple Rules for Resource Allocation



Bolstering Growth Through Organizational Transformation



A People-First Guide to Organizational Transformation

## Technology, Data & AI



Tech Debt – Pay Me Now or Way More Later



Enterprise Architecture: The (Frequently) Missing Link



IT and Business: Can't We All Just Get Along?



Generative AI and the Productivity Supercharge



Adopting an Enterprise AI Strategy: Your Roadmap for Competitive Advantage





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