

AI Diagnostic & Implementation Playbook

March 2026

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 enables 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 in AI, 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



Talent: *Strategy expertise with hands-on operating leadership experience*

We deploy **former executives and transformation leaders** who have owned P&Ls, led integrations, driven performance improvement, and delivered EBITDA impact inside complex organizations, not just advised from the sidelines

Our Differentiators



Flexibility: *Tailored team size and structure to fit value creation agenda*

We **scale to the need**, from **1-2 operators** for targeted 90-day initiatives to **8+ person embedded PMO** or turnaround offices, accelerating execution without overstaffing



Value: *High-impact teams at a lower blended cost than traditional MBB models*

Flexible staffing and right-sized teams allow sponsors and portfolio companies to **deploy capital toward execution**, not overhead

Our Leadership Team serves as trusted partners from AI 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**

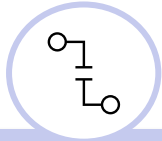
There is a growing gap between AI promise and the reality of implementation reality – our model closes it

THE WALL STREET JOURNAL.
How the AI Boom Is Leaving Consultants Behind

“They charged us \$20 million and what I feel like we got was a very long report on where AI is going without any real practical application”

Why other firms are struggling	Why HPA is succeeding
<p>Lack of AI expertise and client mismatch</p> <ul style="list-style-type: none"> • Consultants have no more experience than client teams and are learning on the client’s dime • Client enterprises are more knowledgeable about their own tech; internal teams are better equipped to develop their AI use cases 	<p>Direct AI experience and collaborative partnership</p> <ul style="list-style-type: none"> • Deployment of former C-suite leaders who have led AI transformations inside companies • Embedding within client teams, complementing internal skills, and ensuring ownership of solutions • Established methods for ROI modeling, use case discovery, and change management
<p>Gap between concept and execution</p> <ul style="list-style-type: none"> • Proofs of concept work in isolation but stall when requiring real-world implementation and scaling enterprise-wide 	<p>Delivery leadership with AI/LLM partners</p> <ul style="list-style-type: none"> • Clear prioritization of high-value use cases, moving beyond proofs of concept into enterprise adoption • Selection of best-fit vendors, negotiation of contracts, and oversight of integrators to ensure timely, value-driven outcomes
<p>Results are underwhelming</p> <ul style="list-style-type: none"> • Consulting teams underdeliver, and clients pay millions for reports with little to no ROI 	<p>Measurable ROI</p> <ul style="list-style-type: none"> • Every initiative anchored in measurable outcomes (e.g., cost savings, revenue lift, cycle-time impact, CX improvements, etc.) • Stakeholder alignment, role-based training, and governance frameworks that make adoption stick and sustain results

If your company is struggling with AI, we can get you back on track



Identify What's Not Working

Symptoms we see:

- **Pilots stuck in “proof of concept purgatory”:** initiatives launched but never scaled beyond testing
- **Data gaps slowing progress:** poor availability, access, or integration keeps AI from performing
- **Limited adoption by end users:** frontline teams resist new tools or revert to manual workarounds
- **ROI unclear or missing:** leadership struggles to connect AI spend to measurable business outcomes



Diagnose Root Causes

HPA's analysis will include:

- **Data audit:** assess availability, quality, and interoperability across core systems (ERP, CRM, EHR, etc.)
- **Use case alignment:** determine whether initiatives map to enterprise priorities or sit in silos
- **Process readiness:** evaluate governance, decision rights, and change management capacity
- **ROI discipline:** verify that baselines, KPIs, and tracking mechanisms exist to measure impact



Reset for ROI

The path forward:

- **Clarify what's working vs. what's noise:** separate viable initiatives from those unlikely to deliver
- **Rebuild the foundation:** strengthen data, process, and governance to support execution
- **Re-prioritize and relaunch use cases:** focus on 2–3 initiatives with the highest business impact
- **Track adoption and ROI from Day 1:** embed measurement, accountability, and change leadership upfront



HPA helps leaders turn struggling AI initiatives into successful outcomes by meeting them where they are



Our AI and Data & Analytics Practice Leaders have deep expertise

Not Exhaustive

Data Analytics & AI Leaders

Experience



Suchitra Deo

Former Senior Principal at BCG who specializes in AI and intelligent automation across fintech, insurtech, and broader financial services organizations. Held additional senior roles as Director of IT Strategy at Nationwide and Director of IT at TD Ameritrade

- Developed AI roadmap and cloud data pipeline strategy for an insurtech client, improving claims turnaround time by 25% and automating workflows through GenAI
- Led discovery and delivery of AI-powered analytics for a healthcare client, connecting domain-specific data pipelines to real-time intelligence and business applications
- Architected a multi-cloud modernization program for a global insurer, reducing risk by 25% while enhancing scalability and governance



Jay Bhinde

Former BCG Partner and seasoned AI transformation executive with cross-industry experience. Held additional senior roles at Deloitte, Accenture, Barclays, and Lehman Brothers, and co-founded the food-tech startup KhayeJao

- Led an AI-driven transformation for a large state entity, boosting resource capacity 20% and speeding service delivery by identifying operational and technology improvement opportunities
- Directed enterprise ops & product management for CEO/COO, including using AI enabled process optimization that enhanced org effectiveness and improved efficiency 10%
- Modernized a mid-size healthcare provider's digital stack, applying AI process optimization to cut costs 15% and enhance CX



Marcus Roth

Former Partner in McKinsey's Strategy & Digital Practices, where he led AI-driven process optimization, organizational transformation, and technology implementations for clients globally. Held an additional role as an Investment Banker for DEG

- Established a firm-wide Data & AI capability for a major FinServ company, defining a 5-year Data & AI strategy and launching a "digital factory" to deliver AI use cases at scale across BUs
- Designed an AI-enabled data platform for a technology-led healthcare services provider, improving patient and payer interactions and standardizing systems across multi-state clinics
- Built AI-driven clinical and patient engagement applications for a global pharma company, including insulin management systems and scalable patient-provider interaction tools

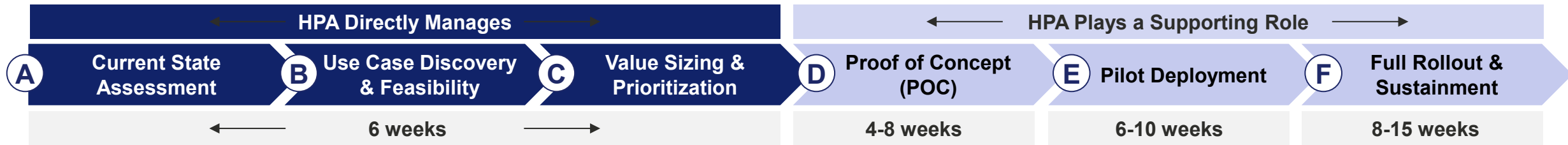


Ed Wiley

Former McKinsey Expert Consultant who held additional roles as Big Data Analytics Lead at Seagate Technologies, Chief Data Scientist for Sears Holding Co., CIO and Chief Data Scientist for PenLink, and Chief Data / Technology Officer for Opsis Health

- Led enterprise GenAI assessment and roadmap for a leading financial services firm, defining cost-reduction and productivity targets across Product Development and Software Engineering
- Spearheaded machine learning adoption at Series C healthcare startup Nurx, scaling product offerings and cutting patient response times by 50%+ for 225K+ monthly users
- Assessed data and engineering capabilities for a multibillion-dollar FMCG company, applying a RAPID-based operating model to identify AI-readiness gaps and deliver recommendations

We support companies throughout their AI journey to ensure success



HPA's Guiding Principles in our Diagnostic Approach

- **Collaborative Partnership:** Work with you, not 'to you', throughout your AI journey to complement your team's skills and build ownership of new solutions
- **Strategic Value:** Always anchored in ROI and measurable business impact (i.e., cost efficiency, revenue lift, etc.) with clear baselines and benefit tracking
- **Cross-Functional Insights:** Ability to connect strategy, operations, data, and technology into one executable plan
- **Change & Adoption Leadership:** Practical approaches to stakeholder alignment, role-based training, and governance to sustain adoption
- **Scalable Delivery Model:** Access to the right SMEs, partners, and operators tailored to your needs

HPA Supports Implementation Stages to Ensure Lasting Success

- **Negotiate Contracts / Terms with AI Developers & Integrators:** Secure favorable agreements that balance cost, accountability, and client interests
- **Select Best-of-Breed Partners:** Identify and align trusted vendors while ensuring solutions fit enterprise needs
- **Guide Partner Team:** Oversee delivery, resolve blockers, and keep initiatives on track toward business impact
- **We Frequently Work With:**



Our proven approach, combined with our AI expert network, consistently delivers transformational impact and long-term value



6-Step Approach

Phase 1: Diagnostic & Prioritization

- A. Current state assessment:** Evaluate data, tech, and readiness
- B. Use case discovery & feasibility:** Gather insights from stakeholders and data
- C. Value sizing & prioritization:** Rank high-impact, feasible use cases

Phase 2: Implementation & Execution

- D. Proof of Concept:** Test, measure, and refine solutions
- E. Pilot deployment:** Launch initial waves with governance
- F. Full rollout & sustainment:** Scale and sustain enterprise adoption



HPA Expert Network & Experience

- **Former C-suite leaders** who have led enterprise AI transformations inside Fortune 500 companies
- **Specialized SMEs** in AI strategy, automation, and change management
- **Deep sector expertise** spanning healthcare services, medtech, and life sciences/pharma
- **Proven delivery track record** across strategy to scaled implementation
- **Trusted partners** including top-tier analytics and AI firms
- **Global IC network** enabling rapid, tailored team assembly for any industry or geography



Client Impact

Key Measured Results

- **40+ AI Diagnostic & Implementation projects** delivered across industries
- **Productivity gains:** 35-50% uplift in targeted workflows
- **ROI:** >5x realized within the first year

Enhanced Capabilities

- **Sustained adoption** and integration of AI solutions
- **Streamlined processes** and reduced manual workload
- **Faster path from proof of concept** to scaled value

Client Impact: Improving claims processing efficiency

Client overview

- Multinational global custodian for life insurance
- Revenue – \$8B (premiums, fee, net investment income)

Key activities

- **Diagnostic (2 months):** Conducted process walkthroughs across claims intake and adjudication; mapped manual data-entry bottlenecks; benchmarked cycle times vs. peers; identified 15+ automation candidates; prioritized based on error reduction potential and scalability
- **Rollout (6 months):** Built and deployed OCR + AI verification pipeline for claims forms; integrated with internal claims and external regulatory data sources; implemented automated error-flagging and decision support dashboards; trained operations teams and embedded governance, audit trail, and escalation protocols
- **Monitoring / Maintenance (2 months):** Established ongoing model monitoring for accuracy drift and exception handling; fine-tuned algorithms using live production feedback; set up KPI dashboards for SLA adherence; created continuous improvement routines to expand automation coverage to additional form types and data feeds

Use cases implemented

Algorithms implemented:

- **Data integration with internal and external data sources to accelerate decision-making**
- **OCR document recognition and AI verification**
- **Automated indicating of potential errors** made on key claims forms

Outcomes

- Improved claims process efficiency by 18% (~54 FTEs)
- No direct employee reduction due to the growth of portfolio with recent acquisitions; total number of FTEs affected was 300

Total value creation of \$5M+ in efficiency gains from re-allocating FTEs towards higher value activities

Investment

Consulting team:

- 4 people in varying levels for 10 months

Client team:

- Internal engineer support as needed

Client Impact: Optimizing customer retention

Client overview

- Mid-size retail bank; \$3B in revenue
- 600+ FTEs in sales and retention functions

Key activities

- **Diagnostic (1 month):** Mapped churn drivers across the retail portfolio, assessed historical retention performance, and developed initial AI churn-scoring model using existing customer data
- **Pilot (3 months):** Tested AI-generated offers (e.g., XGBoost) in both call center and branch environments, monitored conversion and retention uplift, and refined scoring logic and scripts based on real-time feedback
- **POC developed:** Built and validated an initial POC churn-prediction model, designed pilot retention offers, and launched a dedicated pilot-mode call center; provided agents with prioritized call lists of high-risk customers and tailored, draft scripts, iterating on feedback throughout
- **Rollout (6 months):** Integrated AI models and recommendation engine into core IT systems, expanded targeting and offer engine to all relevant customer segments, and trained staff on new processes and tools

Use cases implemented

Optimized customer retention using AI techniques, implementing algorithms including:

- **Scoring retail customers** and identifying customers with churn risk
- **Building next best products** for remote channels (call center, WhatsApp, online banking)
- **Identifying next best offers** for the front office
- **Providing real-time offerings** for customers who request to close out accounts

Outcomes

- Contributed to ~\$30M annual revenue lift
- Reduced annual customer churn by 1.5%
- Drove significant call center productivity improvements for 120+ FTEs

Total value creation of \$40M+ for the client

Investment

Consulting team:

- 6-person team for 10 months

Client team:

- During engagement: 1 FTE for the 10-month duration + 6 FTEs during 6-month rollout period
- Post-engagement: 3 FTE for ongoing system management

Client Impact: Driving cross-sell performance

Client overview

- B2B fintech company with \$2.5B in revenue
- 200+ sales and account management FTEs

Key activities

- **Diagnostic (2 months):** Analyzed transaction patterns and account behaviors across B2B portfolio, assessed historical cross-sell performance, and developed initial AI scoring model using existing customer data
- **Pilot and POC (4 months):** Implemented AI-powered recommendation engine (using ML models) for account managers, tested personalized product recommendations based on behavioral triggers, monitored conversion rates and refined recommendation logic based on feedback
- **Rollout (6 months):** Integrated recommendation engine into CRM, deployed monitoring across all B2B accounts, trained sales teams on AI-guided cross-sell processes and recommended automated trigger-based campaigns

Use cases implemented

- **Account behavior scoring** built to identify high-propensity cross-sell opportunities based on transaction velocity, product usage patterns, and engagement metrics
- **Automated triggers** activated by specific behavioral indicators such as increased transaction volumes, new business formations, or seasonal spending patterns
- **Predictive churn prevention** integrated with cross-sell recommendations to retain at-risk accounts while expanding wallet share

Outcomes

- Increased cross-sell rate by 3.2%
- Enhanced account manager productivity by 5%
- Improved average revenue per account (ARPA) by 18%

Total value creation of \$25M+ for the client

Investment

Consulting team:

- During engagement: 3-person team for project duration + 2 additional data scientists for 6 months
- Post-engagement: 2 consultants for ongoing system management and optimization on as-needed basis

Client team:

- Process manager for 12 months
- Individual process owners leveraged ad hoc for process mapping and iterations

Client Impact: Elevating campaign outcomes

Client overview

- Multi-platform media company with \$25B in revenue
- 150+ marketing and campaign management FTEs

Key activities

- **Diagnostic (6 weeks):** Analyzed existing audience segmentation approaches across digital and traditional media, mapped current demographic and behavioral data sources, and developed initial AI micro-segmentation model using historical campaign performance data
- **Pilot and POC (3 months):** Developed micro-segment generator using ML (including clustering analysis and behavioral pattern recognition), tested automated audience creation based on real-time behavioral triggers and demographic signals, monitored engagement rates and refined segmentation logic based on performance feedback, launched AI-driven campaign dashboard providing marketers with granular target groups
- **Rollout (5 months):** Integrated micro-segmentation engine into Marketo (client's existing system), deployed audience optimization across all digital channels, trained campaign teams on micro-targeting processes

Use cases implemented

- **Audience clustering** based on 500+ demographic variables (age, location, income, education) combined with behavioral signals from content consumption patterns, engagement history, and social media interactions
- **Micro-segment generation** creating hyper-targeted groups such as "urban millennials interested in sustainability who engage with video content on weekends"
- **Predictive lookalike audience expansion** identifying new prospects with similar behavioral patterns

Outcomes

- Increased campaign engagement rates by 4.8%
- Improved CPA by 18%
- Enhanced campaign manager productivity by 45% through automated segment creation

Total value creation of \$30M+ for the client

Investment

Consulting team:

- During engagement: Team of 4 consultants for 10 months
- Post-engagement: Light-touch advisory support on as-needed basis

Client team:

- Campaign manager and Marketo specialist for 9 months
- Individual channel owners when needed

HPA | HighPoint Associates

Trusted Partners Since 2002

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