

## STONEBANK PARTNERS

# APEX™ — Adaptive Portfolio & Executive Decision Excellence Program

C-Suite Governance & Decision Focused · AI-Enabled · Strategy-to-Execution · Results-Driven

### What CEOs and CFOs Need to Address Now

Companies face a decision infrastructure built for a slower era. Capital allocated in silos — R&D, IT, Operations, M&A — with no integrated view of priorities, resource commitments, or strategic alignment. The result: chronic overcommitment, misaligned investments, and execution that underdelivers. Most advisory firms are misaligned — none integrate all investment types into a single CEO-level framework that adapts in real time.

*“The gap is a partner who understands the full investment decision system — strategy through execution — integrates all investment types into one framework, and stays accountable to financial outcomes, not to a project scope.”*

**Tim Durst — Founder & Senior Managing Partner, Stonebank Partners LLC**

### The Cost of Poor Capital Allocation Decisions

## 40%+

of major corporate investments fail to deliver on their original business case

*(Cooper / PDMA; McKinsey)*

## 40%

more valuation created by companies with active capital reallocation vs. static allocators over 15 years

*(McKinsey Global Institute)*

## 75%

of project managers report being asked to execute more projects than their organization has capacity to support — leaving top priorities under-resourced

*(PMI, 2021)*

### The APEX™ Integrated Decision System — Strategy Through Execution

#### 1 Strategy & Opportunity

Corporate strategy · long-range planning · market and competitive analysis · M&A opportunity identification · innovation ideation · NPD pipeline entry criteria

*AI: APEX Signal™ — competitive monitoring · market opportunity scoring*

#### 2 Portfolio Management & Investment Governance

Investment Council governance · IPT cross-investment prioritization · resource allocation · roadmapping · active project pipeline visibility and budget tracking

*AI: APEX Control™ · APEX Scenario™ · APEX Resource™ · APEX Value™*

#### 3 Active Investment Execution Monitoring

Phase and timeline · resource actuals vs. plan · budget performance · key risks · business case assumptions vs. reality across all investment types

*AI: APEX Control™ — continuous monitoring · exception alerting*

#### 4 Post-Investment Performance & Learning Loop

Business case actuals vs. plan · EBITDA contribution tracking · NPD post-launch review · M&A integration · CapEx ROI · assumption accuracy feedback

*AI: APEX Control™ — post-investment vs. plan · financial monitoring*

### What Sets Stonebank Apart

- 1 C-Suite Governance & Decision Architecture**  
Every engagement anchored in the quality of executive investment decisions. Governance and decision rights designed before AI is layered in — process without decision discipline produces faster wrong answers.
- 3 AI Intelligence Suite — Always-On**  
Five proprietary AI tools — APEX Control™, APEX Scenario™, APEX Resource™, APEX Value™, APEX Signal™ — deliver continuous portfolio intelligence and decision support between quarterly reviews.
- 5 Execution-Connected — Strategy to Results**  
Live connections between portfolio decisions, execution data, resource capacity, and financial actuals. A closed feedback loop that surfaces underperformance early and enables confident mid-cycle corrections.

- 2 All Investment Types — One Integrated Framework**  
NPD, M&A, CapEx, IT, and CI under shared governance and resource allocation. The first offering to integrate all major investment types with a single prioritization and strategic alignment view.
- 4 Agile & Adaptive — Not Calendar-Bound**  
Annual plans are a foundation, not a constraint. APEX™ provides real-time portfolio visibility and tools to adjust priorities, reallocate capital, and decide confidently when markets demand it.
- 6 Peer C-Level Advisory — No Junior Handoffs**  
Senior practitioners and former C-suite executives throughout every phase. The advisor who understands your portfolio is present at every key decision.

## Program Structure

Tailored: Diagnostic · Full System · C-Suite Governance · AI Intelligence Suite · Retainer

<b>1 Diagnostic &amp; Alignment</b> <ul style="list-style-type: none"> <li>▶ Maturity assessment — all investment types</li> <li>▶ Strategy → investment linkage gaps</li> <li>▶ 20–40% misalignment identification</li> <li>▶ AI readiness scoring</li> <li>▶ Quantified value opportunity (\$)</li> <li>▶ APEX™ implementation roadmap</li> </ul>	<b>2 Design, Pilot &amp; Rollout</b> <ul style="list-style-type: none"> <li>▶ Investment Council and IPT design</li> <li>▶ APEX™ AI Intelligence Suite deployment</li> <li>▶ APEX Control™ dashboard live</li> <li>▶ Pilot Investment Council Reviews</li> <li>▶ Capability building and transfer</li> </ul>	<b>3 Sustain &amp; Retainer</b> <ul style="list-style-type: none"> <li>▶ Quarterly Investment Council facilitation</li> <li>▶ Annual Strategic Planning support</li> <li>▶ Annual Operating Plan integration</li> <li>▶ AI tools updates and tuning</li> <li>▶ On-demand advisory — M&amp;A, pivots, CapEx</li> </ul>
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## The APEX™ AI Intelligence Suite — Proprietary Tools Embedded in the Process

<b>1 APEX Control™ — Monitor — Real-Time Executive Dashboard</b> Real-time integrated view of portfolio value, resource utilization, strategic alignment, and execution performance — continuously updated. Portfolio health visible at any moment, not just quarterly.	<b>2 APEX Scenario™ — Simulate — AI-Powered “What If” Modeling</b> Instant “what if” analysis across the full portfolio: budget cuts, priority shifts, M&A impacts. NPV and resource projections in minutes. Turns reviews into real decision forums.
<b>2 APEX Resource™ — Balance — Cross-Portfolio FTE &amp; Budget Modeling</b> Real-time demand vs. capacity modeling across all functions and investment types. Identifies overcommitment before projects are derailed. Enables data-driven ‘draw the line’ prioritization.	<b>3 APEX Value™ — Score — Automated Investment Evaluation</b> Scores every investment on strategic alignment, return, risk, and resource feasibility — consistently across all types. Replaces advocacy-driven decisions with objective, transparent ranking.
<b>3 APEX Signal™ — Sense — Continuous External Intelligence</b> Monitors competitive moves, regulatory changes, technology developments, and market signals continuously. Weekly portfolio-relevant briefings so the Investment Council is never caught off-guard.	

## Who We Serve

<b>Mid-Market &amp; Large Enterprise</b> <i>\$500M – \$10B+ · Complex Portfolios</i>	<b>PE-Backed Companies</b> <i>Value Creation · ROI Transparency · Board Visibility</i>	<b>Companies Facing Performance Gaps</b> <i>Misalignment · Overcommitment · Execution Failure</i>
Companies in industrials, manufacturing, medtech, consumer, technology, and financial services where capital allocation decisions across NPD, CapEx, IT, and M&A directly drive competitive positioning. CEOs and CFOs are the primary engagement drivers.	PE sponsors require the strategic rigor, ROI transparency, and execution predictability APEX™ delivers. APEX Control™ provides the always-current portfolio dashboard PE boards demand.	Organizations with resource conflicts across investment types, failed strategic initiatives, or board pressure to improve capital allocation transparency and investment ROI accountability.

<b>STONEBANK PARTNERS LLC</b> APEX™ — Adaptive Portfolio & Executive Decision Excellence Program Your Strategic Steering Wheel for Capital Allocation and Execution	<b>Capabilities</b> <ul style="list-style-type: none"> <li>▶ APEX™ Integrated Portfolio Management</li> <li>▶ APEX™ AI Intelligence Suite</li> <li>▶ C-Suite Governance &amp; Advisory</li> </ul>	<b>Contact</b> www.stonebankllc.com contact@stonebankllc.com Chicago · Milwaukee · Minneapolis
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