

# INNOVATION and DECISION EXCELLENCE PROGRAM™

Decision-Driven · AI-Enabled · People-Empowered · Execution-Focused

MedTech · High Technology · Industrial · Consumer Products · B2B Services

## What innovative product/services-driven companies need to address now

Companies where continuous product/services innovation defines competitiveness and financial success face an environment that is more demanding than ever. Legacy product lines must now be complemented with integrated digital and AI-enabled offerings — a level of portfolio and development complexity most existing processes were not designed for. AI opportunities for products and processes are plentiful but complex to navigate. Regulatory pressures, accelerating competitive cycles, and shifting customer expectations are driving the need for process transformation now. How you innovate defines what you innovate.

Most advisory consulting firms are misaligned with these needs: large firms are project-based and conceptual, boutiques lack breadth and depth, and none address the behavior and adoption gap that determines whether implementations deliver results.

*The gap is a partner who understands the full development system — portfolio strategy to on-market support — what constitutes best-in-class and stays accountable to outcomes, not to a project scope.*

## THE COST OF WEAK PRODUCT DEVELOPMENT PERFORMANCE

**40%+**

of R&D projects fail to deliver on their original business case

**63–78%**

NPI success rate with best-practice stage-gate vs. 25–45% without

**28%**

of companies use AI meaningfully in New Product Development

*"The problem is not always lack of process — it is that people are not doing what the roles and process require, and decisions are being made with poor information. AI becomes transformative because it improves decision inputs, process productivity, speed, and consistency. But skilled people, working together, with the right behaviors make the difference"*

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

## WHAT SETS STONEBANK APART

<b>01</b>	<p><b>Governance and Decision Excellence at the Core</b> Every engagement anchored in the quality of portfolio and gate decisions. Decision architecture built before AI is layered in. Process without decision discipline produces faster wrong answers.</p>	<b>02</b>	<p><b>Full Lifecycle Integration</b> Strategy → Portfolio → Stage-Gate → Launch → Feedback. The full development system, not isolated phases. No strategy without execution accountability and meeting expected financial objectives</p>
<b>03</b>	<p><b>People, Behaviors &amp; Change</b> Many companies have the process, but people aren't doing what the roles and process require. Critical thinking is a gap. Behavior change and adoption are as important as system design — we address both.</p>	<b>04</b>	<p><b>AI Operationalized — Not Theoretical</b> AI deployed in business operations: gate readiness, portfolio scenario modeling, VOC synthesis, and business case benchmarking. Also incorporated into complex digital and AI-enabled product offerings.</p>
<b>05</b>	<p><b>Hands-On Execution — Not Reports</b> Senior practitioners work directly with your leadership and teams throughout delivery. No junior handoffs. The advisor who understands your portfolio and business objectives is present at every stage.</p>	<b>06</b>	<p><b>Fortune 500 Depth &amp; Breadth</b> 25+ years advising Fortune 500 product leadership across MedTech, Industrial, High Technology, and Consumer. Cross-functional depth from portfolio strategy to commercial launch.</p>

## PROGRAM STRUCTURE

Tailored options: Diagnostic – Full System – Governance and Decision-Making - AI Enhanced – Advisory/Coaching

<p><b>01 Rapid Diagnostic</b></p> <ul style="list-style-type: none"> <li>▸ Performance and practices assessment</li> <li>▸ People, behaviors, adoption gaps</li> <li>▸ Governance and Decision gaps</li> <li>▸ AI readiness and opportunity heatmap</li> <li>▸ Prioritized improvement roadmap</li> </ul>	<p><b>02 System Transformation</b></p> <ul style="list-style-type: none"> <li>▸ Portfolio and stage-gate system redesign and training</li> <li>▸ AI agent / tool design and deployment</li> <li>▸ People &amp; behavior change program</li> <li>▸ Live pilots and executive/team coaching</li> </ul>	<p><b>03 Sustain &amp; Scale</b></p> <ul style="list-style-type: none"> <li>▸ Quarterly portfolio review facilitation</li> <li>▸ Broad roll-out with pilot refinements</li> <li>▸ AI tool updates and decision support</li> <li>▸ Post-launch tracking and learning loop</li> <li>▸ Retainer advisory</li> </ul>
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**Four integrated process layers**

**1 Strategy & Opportunity**

Business and Product Strategy · VOC · competitive analysis · ideation · platform strategy · digital/AI offering opportunities

**2 Portfolio Management**

Governance · prioritization · resource allocation · scenarios · road mapping

**3 Stage-Gate & Execution**

Governance · Cross-functional core teams · business case · gate discipline

**4 Launch & Post-Launch**

Commercial readiness · field performance · actuals vs. plan · learning loop

**AI Architecture & Key Use Cases**

AI embedded across all four process layers — not a standalone tool. Key Tier 1 use cases with their AI advantage:

▶ **Gate readiness AI**

Without AI: 4–6 weeks of manual gate prep, variable quality. With AI: clear/consistent readiness, focused decisions; 25% faster/better decisions.

▶ **Portfolio scenario modeling and prioritization**

Without AI: advocacy-driven; manual aggregation takes weeks. With AI: live dashboards; more comprehensive and real-time trade-off analysis.

▶ **Voice of customer synthesis**

Without AI: 12–20 interviews, point-in-time. With AI: thousands of signals continuously synthesized — faster, broader, and objective.

▶ **Business case financial modeling**

Without AI: team-built on optimistic assumptions; 50% variance. With AI: consistent, benchmarked against historical actuals; automatic sensitivity analysis.

**Decision Excellence & Governance**

Decision speed and quality is the primary driver of NPD outcomes. Research shows 49% of managers continue funding failing projects due to sunk cost bias — and dysfunctional advocacy overrides formal governance — and functions do not align on execution. Stonebank's Decision Excellence architecture addresses this with explicit committee structure, kill criteria, cross-functional alignment protocols, objective and consistent AI-generated portfolio and project analysis and documents, and a post-launch learning loop that compounds decision quality over time.

**People, Behaviors & Change**

Most companies with formal processes still underperform — not because the process is completely wrong, but because people are not doing what the roles and process require. Leadership does not pre-read. Core team leaders lack authority. Functional managers staff incompletely and with available people rather than right people. Behavior change and adoption are as critical as system design.

**We address both — designing the system and activating the behaviors that make it work.**

WHO WE SERVE

**Mid-Market & Large Product Companies**

\$100M – \$5B+ · Complex Portfolios

Companies with complex product and service portfolios across MedTech, Industrial, High Technology, and Consumer — where portfolio and gate decision quality directly drives financial performance. Given importance and cross-functional nature CEOs, Presidents are most often the key drivers of transformation.

**Companies Integrating Digital & AI into Products/Services and Business Operations**

Digital · AI-Enabled · Services

Organizations that are serious about leveraging AI in the NPD processes, Also those developing new offerings that complement legacy products with integrated digital capabilities and AI-enabled services — where new development complexity requires a more sophisticated portfolio and gate system.

**Companies Facing New Product/Services Performance Gaps**

Speed · Business Case · Quality

Companies experiencing difficulty with new product and services speed-to-market, business case achievement, development productivity, or customer experience outcomes — where Decision Excellence, behavior change, and AI create immediate improvement.

WHY STONEBANK — A DIFFERENT MODEL. A DIFFERENT STANDARD.

**Traditional Product Development Consulting**

- × Process design; adoption and behaviors left to you
- × AI mentioned; not deployed in actual NPD workflows
- × No support for digital/AI product portfolio complexity and governance
- × Junior delivery; senior partners visible but absent
- × Generic frameworks not adapted to your context

**Stonebank Innovation Excellence Program™**

- ▶ **Process + people + behaviors + AI — all addressed together**
- ▶ **AI in gate readiness, portfolio, VOC, and business case tools**
- ▶ **Built for complex portfolios including digital and AI-enabled offerings**
- ▶ **Senior practitioners engaged throughout every milestone**
- ▶ **System built for your specific portfolio, teams, and sector**

**STONEBANK PARTNERS LLC**

**Product Innovation Excellence Program™**

Your Catalyst and Partner for Product Innovation Results  
Chicago, IL · Milwaukee, WI · Minneapolis, MN

**Capabilities**

- ▶ Decision Excellence
- ▶ Portfolio Management
- ▶ Stage-Gate Redesign
- ▶ AI Operationalization
- ▶ People & Change

**Contact**

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