

Case Study: Orchestrating Enterprise AI Transformation Through Convergent Strategic Planning

Enabling a Global CPG Leader's Journey to Become an AI-First, Digitally Native Organization

Overview

The Holistyx Group partnered with Capgemini and Microsoft to facilitate a comprehensive strategic planning engagement for one of the world's largest consumer packaged goods (CPG) companies. The initiative aimed to synthesize a complex landscape of 62 transformation opportunities into a coherent, executable roadmap for enterprise-wide AI adoption and digital modernization.

Utilizing THG's proprietary SCOPE (Strategic Customer Objectives Planning Exercise) methodology combined with advanced Value Attribution Framework analysis, the engagement delivered a defensible strategic blueprint with projected value creation of \$4B+ over three years—while establishing transparent investment allocation across all ecosystem partners.

The Strategic Imperative

The client, a Fortune 50 global CPG leader with operations spanning 180+ countries, faced mounting competitive pressure from multiple vectors:

- **Legacy Technology Debt:** Decades of accumulated technical debt across enterprise systems, including heavy SAP dependency constraining agility
- **Disruptive Competition:** Agile DTC startups eroding market share with faster innovation cycles and superior consumer responsiveness
- **AI Imperative:** Urgent need to deploy Agentic AI capabilities across operations before competitors establish insurmountable advantages
- **Fragmented Initiatives:** Multiple business units pursuing disconnected transformation efforts without unified strategic vision or value measurement
- **Workforce Evolution:** Aging workforce with critical institutional knowledge requiring systematic capture and augmentation through AI

Objectives

The engagement was structured around four primary objectives designed to create a defensible, executable transformation roadmap:

- Synthesize 62 discrete transformation opportunities into coherent strategic objectives with clear ownership and accountability
- Establish rigorous value attribution methodology that separates client operational value from partner revenue streams
- Identify Quick Wins demonstrating value within 90 days to build momentum and stakeholder confidence
- Create transparent investment framework enabling clear allocation across Microsoft, Capgemini, and internal resources

Strategy & Execution

THG deployed a multi-phase engagement combining facilitated strategic workshops with rigorous analytical frameworks, delivering outputs that exceeded traditional strategic planning exercises in both depth and defensibility.

1. SCOPE Workshop Facilitation

THG facilitated intensive two-day workshops with 30+ senior stakeholders utilizing the proprietary SCOPE methodology:

1. **Vision Co-Creation:** Collaborative development of transformation vision: "Enable [Client] to transform into an AI-first, digitally native organization that leverages intelligent automation and unified technology platforms"
2. **Opportunity Harvesting:** Systematic capture of 62 transformation opportunities across five business domains with stakeholder attribution
3. **"What If" Innovation:** Facilitated ideation sessions generating aspirational scenarios to stretch thinking beyond incremental improvement
4. **Stakeholder Mapping:** Detailed influence analysis categorizing champions, engagers, and conversion targets for change management planning

2. Convergent Validation Framework

To achieve high-confidence strategic recommendations, THG applied a four-methodology convergent validation approach—ensuring each opportunity was assessed through multiple independent analytical lenses:

1. **Impact/Effort Prioritization:** Precision scoring (0-100 scale) positioning each opportunity uniquely within strategic quadrants
2. **Quick Wins Analysis:** Identification of 16 high-impact, low-effort initiatives capable of demonstrating value within 90 days
3. **Vision Alignment Scoring:** Assessment of each opportunity's contribution to the AI-first transformation vision
4. **Feasibility Assessment:** Technical, organizational, and financial feasibility evaluation with risk-adjusted confidence levels

"Convergent validation provides 95%+ confidence in strategic recommendations by requiring alignment across four independent analytical frameworks. Single-methodology approaches leave too much room for bias and blind spots."

3. Bundle Strategy with Synergy Multipliers

Rather than treating 62 opportunities as independent initiatives, THG synthesized them into five strategic objective bundles designed to maximize synergistic value:

1. **Enterprise Agentic AI:** Workforce optimization through intelligent automation (60-70% productivity improvement potential)
2. **Technology Modernization:** Cloud-native infrastructure and legacy exit strategy (SAP transformation, Azure migration)
3. **Supply Chain & IoT Excellence:** Real-time visibility and predictive operations across global manufacturing
4. **Demand & Product Management:** "Fast fashion" responsiveness with 3-month time-to-market capability

5. **Organization & Change Enablement:** Cultural transformation and adoption infrastructure

Each bundle was assigned conservative synergy multipliers (2.5x - 4.1x) reflecting validated interdependencies between initiatives. These multipliers—capped deliberately to maintain defensibility—enable realistic projection of portfolio value while avoiding the aggressive estimates that undermine executive credibility.

4. **Partner Revenue Allocation Framework (PRAF)**

A critical innovation in this engagement was the development of transparent investment flow modeling across the partner ecosystem. The PRAF establishes clear separation between:

1. **Client Operational Value (Yellow):** Benefits realized directly by the client—cost savings, revenue enhancement, productivity gains
2. **Partner Revenue Streams (Green):** Implementation fees, licensing, and ongoing service revenue flowing to Microsoft, Capgemini, and THG

This two-layer attribution model—determining internal vs. external investment splits, then allocating external pools among partners using weighted factors—provides unprecedented transparency for executive decision-making and partner accountability.

Projected Results

The engagement delivered comprehensive strategic outputs with the following projected outcomes:

Metric	Projected Outcome
3-Year Value Creation Potential	\$4.0B - \$4.95B
Portfolio ROI Multiple	18x - 22x
Quick Wins Identified	16 initiatives (90-day value demonstration)
Strategic Objectives Synthesized	5 integrated bundles from 62 opportunities
Productivity Improvement (AI Operations)	60-70% enterprise-wide
Time-to-Market Improvement	18 months → 3 months (6x acceleration)
Transformation Horizon	Q4 2025 - Q4 2028

Additional Deliverables:

- Comprehensive Strategic Objectives Report with Executive Card format for each bundle
- Detailed Value Attribution Framework with transparent methodology documentation
- Partner Revenue Allocation model enabling clear investment flow visibility
- 30-60-90 day implementation roadmaps for each strategic objective
- Stakeholder engagement matrix with change management recommendations

Lessons Learned

- **Convergent validation eliminates false confidence:** Single-methodology prioritization often produces recommendations that fail under executive scrutiny. Multi-framework validation builds defensible business cases.
- **Bundle strategy unlocks exponential value:** Treating transformation opportunities as integrated portfolios with synergy multipliers captures value that siloed initiatives cannot realize.
- **Transparency builds trust in complex ecosystems:** Clear separation of client value from partner revenue enables honest conversations about investment allocation and accountability.
- **Conservative estimates preserve credibility:** Capped synergy multipliers and risk-adjusted projections withstand CFO scrutiny better than aggressive estimates that appear only once in workshop materials.
- **Quick Wins create transformation momentum:** Identifying initiatives that demonstrate value within 90 days builds stakeholder confidence essential for larger strategic investments.

Conclusion

This engagement demonstrates how rigorous strategic methodology can transform a fragmented landscape of transformation opportunities into a coherent, executable roadmap. By combining THG's SCOPE facilitation approach with advanced Value Attribution Framework analysis, the client received not just a strategic plan, but a defensible business case capable of withstanding C-suite scrutiny.

The convergent validation approach—assessing each opportunity through four independent analytical lenses—achieved confidence levels exceeding 95% for strategic recommendations.

The bundle strategy with conservative synergy multipliers projects \$4B+ in value creation while maintaining the methodological rigor that executives demand.

Most critically, the Partner Revenue Allocation Framework established a new standard for transparency in complex transformation ecosystems. By clearly separating client operational value from partner revenue streams, all parties can engage in honest dialogue about investment allocation, accountability, and shared success.

Results Update

[This section will be updated as implementation progresses and measured outcomes become available. Target update: Q2 2026 following Quick Wins realization.]

Planned Metrics for Update:

- Quick Wins value realized vs. projected
- Year 1 bundle implementation status
- Stakeholder adoption metrics
- Adjusted value projections based on implementation learnings

The Holistyx Group

Simplifying the Complexity of Change

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