



Precipio

Management Consulting

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a division of Precipio, LLC



Precipio, LLC

Company Overview

Precipio, LLC

Relationships Results Value

A Trusted Business Partner



[See Our Partners](#)

"Many of the challenges facing our clients today must be addressed through both organizational shifts and digital process transformation, together leading to the desired business performance and measurable results. Precipio partners with our client teams and guides and supports them at each step."

- Andrew Winter, CEO and Managing Director

Precipio, LLC



- Full Service Management Consulting Firm
- 8 Managing Partners / Industry Advisors
- >25 Associate Partners and Associates
- Global Experience, Local Cost
- Experienced Business & Performance Excellence Leaders
- Extensive and Relevant Transformation / Value Creation Record

Precipio, LLC is a full service management consulting firm that supports clients to achieve their business objectives.

Precipio applies proven, client-centric Business and Performance Excellence Strategies and Execution to create Client Value and lasting Business Process Transformation. We apply our broad and deep knowledge of Business, Operations, Strategy, Fundraising, Market, Channel, and Business Development, Customer Experience, Engineering and Technology, Portfolio and Program Management, Quality Systems / Lean Six Sigma, and Executive Leadership and Coaching to help our clients succeed.

Precipio consultants have each earned their decades of experience helping companies of all sizes and market sectors achieve substantial and sustainable results at an accelerated pace with a direct financial and product, service, or mission performance impact.

Precipio, LLC

Example Capabilities

Organizational Excellence (OEx)	Market, Channel, and Business Development	Strategy	Digital Transformation
Business Transformation	Executive Leadership (CXO)	Business Intelligence	Leadership Development
Data Science & Analytics	Operating Model Excellence (OMx)	Performance Management	Metrics & Dashboards
Customer Experience	Lean Six Sigma Transformation	Governance and Policy	Quality Systems
Portfolio Management	Process Engineering	eLearning	Certification

Precipio Consulting

Sample of Partner Experience

Financial Services

Life Sciences

Government

Pharmaceutical

Food

Academia

Energy / Petrochemical / Solar

Electronics / Networking/ IT

Manufacturing / Materials

Lasers / Optics / High Tech

(Selected List)



A Few of the Precipio Partners p1/2



Andrew Winter
Executive Consultant

CEO and CFO / Managing Director
Fortune 500 Transformation Experience
Exec. Head of Operations, Engineering, Quality
Service and Manufacturing, Ph.D. Engineer, Exec. MBB, Big 5 Consulting Exp



Jerry Mairani
Executive Consultant

Managing Partner and Chief Learning Officer
Fortune 500 and Healthcare Insurance Transformation Experience
Exec. Head of Operations and Quality, Past President of the ASQ
Service and Manufacturing, Org. Dev. Specialist, Exec. MBB



Jeff Bloom
Executive Consultant

Managing Partner, Fortune 500 Transformation Experience
Exec. Head of Operations Excellence and Quality
LEAN Process Improvement Experience
Service and Transactional Experience, Exec. MBB



Eric Zvaniga
Executive Consultant

Managing Partner Canada, CEO of Idea People, Canada
30 Years of Consulting, Industry, and Fortune 500 Transformation Experience
Exec. Leader of Sales, Data, and Finance Operations
Data Modeling Specialist



Richard Negron
Executive Consultant

Managing Partner, CEO of JVR Tech, LLC
Fortune 500 Large Project Experience
20 Years of Information Technology Industry Experience, Six Sigma Green Belt

A Few of the Precipio Partners p2/2



Angel Garcia
Executive Consultant

Managing Partner, Industry Advisor, and Life Sciences Leader
Fortune 500 Transformation Experience
Exec. Head of Operations, Engineering, Quality
Service and Manufacturing, MBA, M.D., Bio Medical Engineer, Exec. MBB



Yvon Araktingi
Executive Consultant

Managing Partner
30 Years of Quality and LSS Experience
Fortune 500 Large Project Experience, High Tech, Energy, Training
Certified Lean Six Sigma Master Black Belt



David Miles
Executive Consultant

Associate Partner, Managing Partner of Miles Consulting
Fortune 500 Business Development and Project Experience
30 Years of Operational Experience, Media, Energy, Consulting



Arturo DeAlba
Executive Consultant

Associate Partner, Managing Partner of RightSource, LLC
Fortune 500 Transformation Experience
Operations and Transactional Data Specialist
Service and Manufacturing, Exec. CPI Leader



Ramya Venkataraman
Executive Consultant

Associate Partner
Fortune 500 Transformation Experience
Extensive High Tech and Services / Transactional Experience
Exec. MBB, 20 Year of Consulting Experience

Precipio Service Offering

Assess

- ✓ Business Strategy, Mission, Vision, & Roadmap
- ✓ Identify, Develop, & Quantify Business Value
- ✓ Voice of the Customer, Use Cases, Customer Experience
- ✓ Operating Model Evaluation
- ✓ Performance Scorecard & Business Metrics
- ✓ Product Development & Process Performance Metrics
- ✓ Quality Systems Audit / ISO Compliance

Plan / Prepare

- ✓ Portfolio & Program Management
- ✓ Value Case Development & Structure
- ✓ Enterprise Program & Project Planning
- ✓ Change Management Planning
- ✓ Enterprise Workshops: BOD / C-Suite / Staff Leaders
- ✓ Team, Team Leader, & Executive Coaching
- ✓ Process Management Planning
- ✓ Quality Systems / Op-Ex / Lean Six Sigma Planning

Perform

- ✓ Transformation / Turnaround CEO Leadership / Consulting
- ✓ Business Executive Leadership, Operations COO, Finance CFO, Fundraising Executive, Quality CQO, & Engineering Leadership
- ✓ Product Development & Intellectual Property
- ✓ Market, Channel, & Business Development Officer / Consulting
- ✓ Program, Project, & Workshop Execution
- ✓ Process & Systems Reengineering
- ✓ Operating Model Development & Improvement
- ✓ IT / Data Architecture
- ✓ R&D / Technical Consulting

Support

- ✓ Corporate Leadership, Training, & Coaching
- ✓ Facilitated Workshops & Instructor Lead Courses
- ✓ Online Instructor Lead Content & Self-Paced eLearning
- ✓ Strategy, Operating Model, Portfolio Management, Operations Performance Excellence Training
- ✓ Executive Leader, Champion, Green / Black / Master Black Belt Training
- ✓ Project Selection, Objective Deployment, Team Leadership
- ✓ Project Business Case Development & Financial Benefits
- ✓ Policy Deployment, Executive & Process Scorecards, Performance Management, plus many more...

The Transformation Opportunity

Opportunity

- Evaluate the business performance and alignment and delivery of value to your customers, partners, and other stakeholders.
- **Identify improvement or transformation that significantly and materially benefits both customers and the business.**
- Commit to action, realizing and redeploying the benefits, and establishing an elevated performance standard across the enterprise, optimizing customer experience and cost.

Precipio

Transformation Model

Transformation Approach

Transformation Elements

Transformation Experience, Leadership, Support, and your Execution Partner

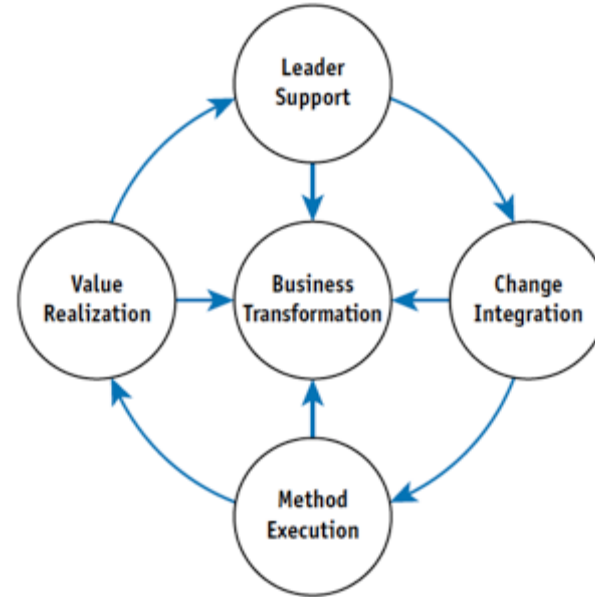
Outcome

1. ***Business Transformation behaviors / designs*** that will achieve the desired Business Transformation Objectives (\$ and Experience) with acceptable risk.
2. The **Knowledge Required** by the Organization top to bottom to properly Manage Process Performance to Sustain Results and Continuously Improve.

The Precipio Transformation Model

Outcomes

- Improve the top line
- Improve the business operating margin
- Improve the experience for customers and community



Approach

Performance Planning – Decide Where You Need to Go

Transformation Readiness – Prepare to Get There

Process Management – Start the Journey, Assess Where you Are

Transformation Execution – Challenge the Barriers and Achieve the Results

Continuous Evaluation – Keep Moving Forward and Don't Fall Back

Precipio Provides Leadership and Support to Achieve Transformation Objectives and Benefits

Precipio as an Accelerator, Catalyst, and Partner

- **Build Speed and Sustain Momentum – Precipio as an Accelerator**

Ability to integrate best-in-class execution strategy and approach

- **Spark and Lead Change at Any Level of the Organization – Precipio as a Catalyst**

Ability to integrate best-in-class Business Leadership, Operating Model, and LEAN and Lean Six Sigma experience across all parts of the organization

- **Precipio as your Execution and Business Partner**

Ability to leverage existing knowledge and experience from building out Fortune 500 capabilities across all divisions, driving consistency and results with each step forward

Ability to scale support in any area of the business transformation journey

Ability to leverage unique knowledge, familiarity with, and understanding of the industry

Ability to leverage a proven track record of delivery experience across multiple industries and corporations



Andrew Winter, Ph.D.
Principal Managing Partner

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Performance Excellence Overview – Case Studies

Selected Case Studies (2007—2018)

Client	Opportunity	Approach	Benefits
Solar Energy Start Up	Transformation Relaunch & Develop and Grow Valuation	Turnaround CEO, C-Suite, Ground-Up Business Op Model	\$75M Cash and >\$200M Projected Value over 12 months
Major NA Bank	Operating Model Reimagined	Strategy + LSS	\$500M over 5 yrs
Global Bank	FA Attrition to Portfolio → Lost Assets	Deep Dive LSS Analytics + Modeling	\$50M in retained earnings (potential)
Global Network Services Company WW Finance	Rebate Payments Vision Mapping	Process Strategy and Redesign	\$750,000
Global Network Services Company Finance Transformation	Restatements Transformation	Global Process Consolidation and Execution	\$60,000,000
Global Network Services Company Finance and Sales	Fair Market Value and Commissions	Redesign Commission and Comp. Structure to Reduce Volume by 90%	\$18,000,000
Global Network Services Company Stock	Employee Escalations and Rework, Compliance Exposure	Detailed Process Redesign and Complexity Reduction	\$500,000
Global Network Services Company Procurement Services	Operating Model only Leveraging 9% of \$6B Spend Annually	Operating Model Redesign and Enablement	\$1 Billion over 3 years

Selected Case Studies (2007—2018)

Client	Opportunity	Approach	Benefits
Global Pharma (Sales & Mktg)	Sales Planning Process → Missed Sales	Rapid LSS DMA	\$100M in revenue
Major U.S. Bank	Poor Six Sigma Program Performance	Change Management + LEAN Approach	\$100M in portfolio benefits
Major NA Bank	Accelerate Process Opportunity Discovery while Building Process Performance Management Infrastructure	Applied Value Chain Management + Kaizen	\$7M in rapid improvements
Major Network and Media Organization	First Ever Joint Venture to Create an English Latino-Targeted Network and Media Destination	Redesign of Operations to Integrate \$100MM Investment from Cradle to Grave and Launch in New Facility in Under 2 years	Network Successfully Launched in Nov 2012 with Revenues Exceeding Expectations in One Year
Major Healthcare Services Provider	With Rapid Changes in Healthcare Environment and the ACA Regulatory Impacts, Develop 5 Year Strategy and Roadmap for a \$2B Medical Services Provider	Working Closely with CEO and the BOD, Identify Needs, Environmental Conditions, Business Objectives, and Barriers to Success.	Created Solutions Universally Approved by Board and Operationalized to Sustain Adequate Cash on Hand while Sustaining Patient Care Excellence in new, challenging Healthcare Environment

Future State Restatements Process Enables Early Sales Goaling, Improved Planning / Forecasting, and >\$10million in Productivity

Opportunity The current Restatements process does not meet critical team and partner expectations, including timeliness, level of effort, and granularity, and must be changed to improve process performance.

Solution A Predictive, consistent, global restatement process was developed for bookings that will provide accurate, trustworthy views to clients in a timely fashion including:

Estimated

Time Reduced lead time of restated data (currently 105 days) by 50% including having input to Sales to support Day-One Goaling (currently day 60)

Cost Reduced the amount of manual processing, hand-offs, and rework (shift to higher value work) by 25-75%

Quality Increased process flexibility for presenting restated data in all needed views and at the required levels of granularity (incl. Architecture)
Reduced variability through global process standardization (target: single point of entry and single location for reporting)

Upwards of 800 people support the current process globally, representing over \$40 million in processing cost today, not counting the opportunity cost of not having restated data to support day-one sales goaling and other company planning and forecasting processes



Transformation Overview: The Operating Model Redefined through LSS

Major North American Bank

Situation

Bank Home Equity Finance Group must significantly **reduce operating costs** (>\$100MM) while **improving product time to market and process flexibility** to **grow market share** lead from 80bp to 200bp, rank #1 in client satisfaction, and enhance employee engagement to >75%

Issue

Current Operating Model will not support Bank Home Equity and Creditor Goals

- Complex Product Programs, Policies, Processes, and Supporting Technology Platforms
- High Exception rates and errors causing rework and poor customer and employee experience
- Limited process / performance management capabilities
- Limited multi-channel distribution offering

Approach

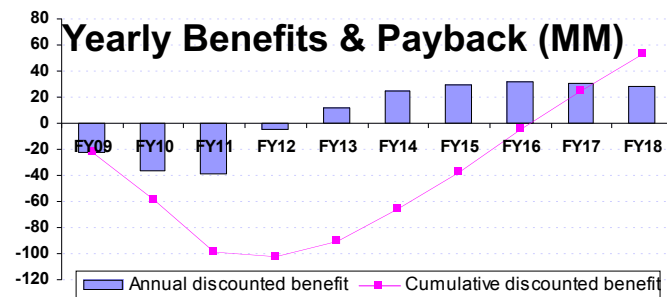
Develop a new Operating Model for Bank HE Finance “from the ground up”

Results

Target Operating Model and Transformation Roadmap Delivered to Bank with anticipated benefits*: Top Line Revenue \$500M & NPV of \$53.1MM

(assumes \$230MM investment, 10% discount rate, 32.5% tax rate)

*Based on Top-Down assessment





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Overview - END



Andrew Winter, Ph.D.
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Strategy | Transformation | Business Dev
Product Dev | Start-Ups | Fundraising | M&A
Board of Directors | CEO | COO | CFO

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Background

Track record of transformation resulting in over \$2 billion in value, over \$200 million in channel, and \$20 million in equity.

Seasoned C-Level executive, consultant, trainer/facilitator, and engineer with 25 yrs. broad and deep experience across industries from energy, renewables, high tech, and manufacturing to financial services, healthcare, gov't, and entertainment.

Start-ups to the Fortune 50, two national labs, US DOE National Ignition Grade 2 Nuclear / Laser Facility, Top-Secret Q clearance.

Strong CEO, COO, CFO, strategy, engineering, people development, fundraising, M&A experience, business development, programs, and change management.

Leader or Advisor to help you evolve and achieve your business transformation, financial growth, market, and customer experience goals.

Other interests: woodworking, metalworking, home remodeling, restoring classic cars, golfing, running, and custom audio.

Ph.D., Materials Science and Engineering, Colorado School of Mines
 B.S., Materials Engineering, Cal Poly, San Luis Obispo
 Certified Lean Six Sigma Black Belt and Master Black Belt

Achievements

Disruptive Energy Companies (2): (1) Completed M&A of growing solar start up and launch of parent company with founder. (2) Completed operational transformation, created business and product development strategy, and provided company leadership and Series A fundraising as President and Transformation CEO & CFO supporting Finance, Operations, Business Development, and Strategy.

Global Media Company: Established the operational model and integration plan for the Joint Venture of two major media organizations, leading to the successful launch of a brand new \$100MM television and social media network. Working with C-level and staff, execute working sessions, strategy development, process design and improvement, implementation and change management efforts across the parent companies and the JV.

Regional Medical Center: Developed the 5 year Strategy and Operating Plan for a \$2B Level 2 Trauma Regional Medical Center. Working with the Board of Directors and the CEO and his staff, execute planning and working sessions to assess past performance, changes in the healthcare environment including impacts of the ACA, and operational goals of the trustees and senior leaders to develop the high level strategy and operational models to achieve the best patience-centered care.

Global Network Product and Services Corporation: Led over 50 engagements to transform almost all divisions of corporation over 5 years. Examples include design of new Corporate Portfolio Management and Governance Process, a new Supply Chain Operating Model for Global Procurement, and a new Global Accounting Model. Trained, Coached, and Led a project and transformation portfolio with financial impact > \$2 billion over three years enabled by deep Lean Six Sigma and Business Process Management capabilities.

Major Financial Institution: Developed a Future State Operating Model and Transformation Roadmap for the Retail Lending Division to yield \$500M in Revenue Growth over the next 5 years, \$30M in quick wins, and reduce the cost structure by 30%.

Major Pharmaceutical Company: Conducted an Operations Strategy and Vision Review for a Marketing and Sales Operations Division, resulting in a new operating model which reduced turn-around time from 4 months to 4 weeks creating an additional 50% capacity.

Global Financial Institution: Developed an attrition risk assessment model including comprehensive driver analysis and metrics development for a large, high-volume wealth-management business unit.

Major Financial Institution: Provide overall direction and leadership for deployment of a Lean Six Sigma Program for a \$7 B lending division. Delivered capability in 12 months with benefits exceeding \$50M over 24 months.

Major US Federal Energy Program: Provided overall direction and leadership for Quality Engineering and Manufacturing Operations for a \$3.5B Department of Energy Program. Built the infrastructure from the ground up, creating new manufacturing and quality divisions, and served as the lead process Data Scientist.

Major Laser and Optical Products Enterprise: Provided leadership for a team that rapidly grew from 50 to 400 senior managers, chemists, engineers, and technicians to establish and grow an optics manufacturing capability in a new division of a \$100 M optical equipment and products company, completing projects that yielded > \$1.7 M of new revenue in less than 6 months. Served as the Sales and Marketing Product Specialist for optical products.

Job Experience

'00- CEO/CFO Management Consulting Firm Precipio

'18-'19 Consulting CEO/CFO - Fundraising / Dev, Tabuchi

'17-'19 President and CFO Solar Energy Start-Up SolPad

'07-'09 Global Engagement Director, Accenture

'07-'08 VP LSS, Wells Fargo

'03-'06 Dir Ops/Quality/LSS, US DOE, UC, LLNL Nat'l Lab

'92-'01 Scientist/Eng. Manager Spectra Physics Lasers, INEL, CSM, Cal Poly

Client Experience

Tabuchi Solar Energy Start Up
 SolPad Solar Energy Start Up
 Enloe Medical Center Hospital
 ABC News & Univision Media
 Edwards Life Sciences Med Dev.
 Cisco Systems Networking / SaaS
 California State Gov't – EDD
 PolyOne Materials
 Royal Bank of Canada, BMO, TD
 UBS Wealth Management
 Shell Oil Energy
 Chevron / TJ Cross Eng. Energy
 Abbott Pharma
 Essilor Optics
 California State University Eng.
 Westgate Hardwoods Manuf.