THE KEYSTONE GROUP

ATLANTA • CHICAGO • LOS ANGELES



KEYSTONE SERVICES

AI AND DIGITAL TRANSFORMATION

DIGITAL TRANSFORMATION & AI ENABLEMENT

The Keystone Group
Atlanta • Chicago • Los Angeles

Adding technology to broken processes creates complexity, not value.

Are your processes ready to be enhanced by technology?

For technology to be impactful, the underlying processes and data must be efficient and accurate. We saw this firsthand with a company that implemented a new ERP but did not have the data foundation to use it effectively.

AI and technology lead 2026 investment priorities for middle-market companies.[1]

WHY KEYSTONE

01 Process Before Technology.
We diagnose and reorganize how the work gets done first, then decide where technology fits.

02 Operators and Engineers.
Our in-house data and AI engineer works alongside the operators. No handoff between business need and execution.

03 Results in Weeks.
Each use case moved from problem to result in 8 to 10 weeks, including adoption and training.

PROVEN AT A PE-BACKED INDUSTRIAL MANUFACTURER, WHERE WE STARTED AS INTERIM CFO

PROCESS AUTOMATION
$22MM
in new orders; quote turnaround from weeks to ~3 days

CUSTOM APPLICATIONS
14% → 81%
weekly NCR resolution; same-day 8% → 57%

ANALYTICS & REPORTING
+48%
weekly throughput, Engineering to Production

AI ENABLEMENT
46% → 97%
vendor mapping across 15K SKUs, 96% validated accuracy

1. KeyBank Q2 2026 Middle Market Sentiment Survey (n = 731 owners and senior executives)

Automated Quote & Assessment Tracker

THE PROBLEM

Customers were pushing for shorter lead times, but there was no process or tool to respond quickly and confidently.

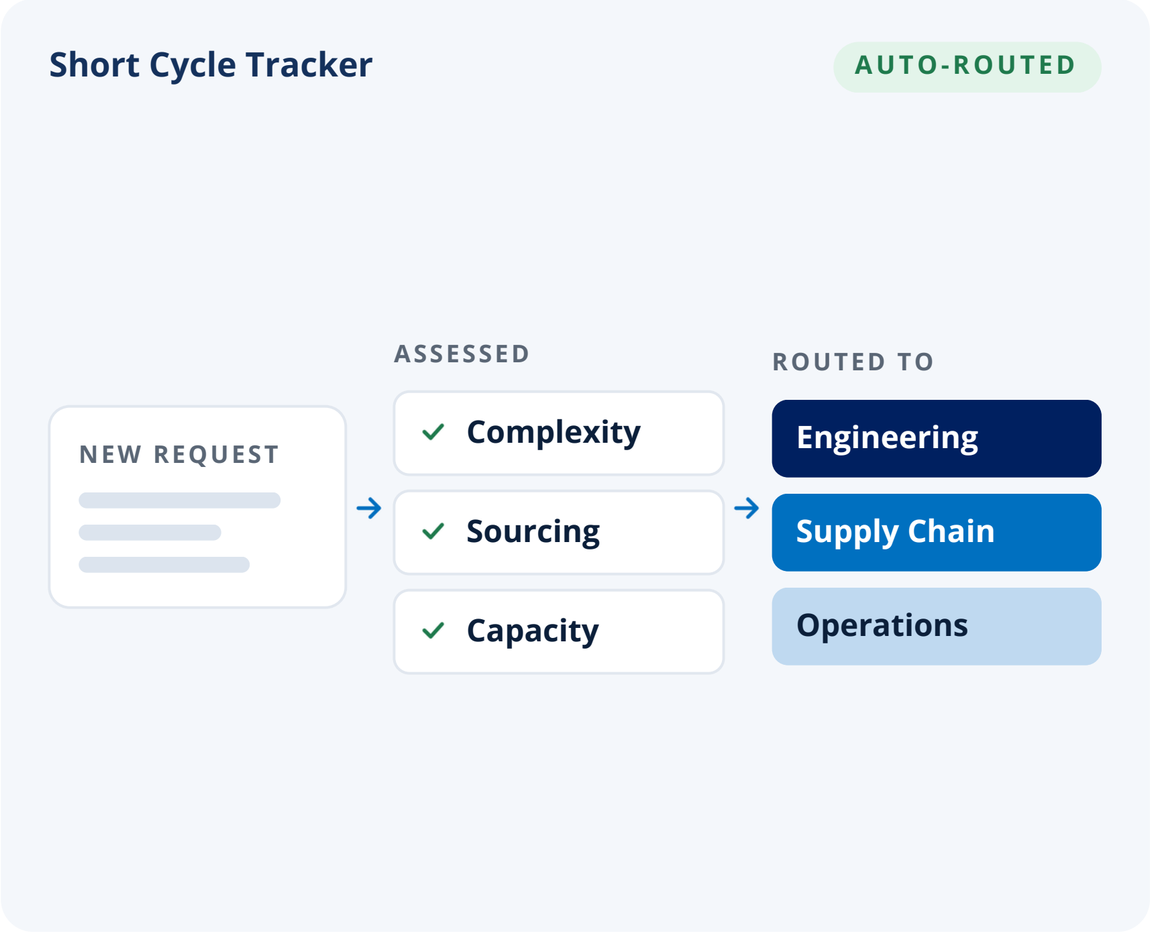
WHAT WE BUILT

We defined the quote process end to end across sales, engineering, supply chain, and operations, then automated assessment and routing so the process runs without manual work.

$22MM
new orders

~3 days
turnaround, from weeks

Over the TTM, the new process facilitated $22MM in new orders while reducing turnaround time from weeks to ~3 days.



> "The Short Cycle Tool has streamlined our process… improved efficiency, reduced the need for pop-up meetings, and allowed us to respond to customer needs faster and more effectively. **VP of Sales**

Nonconformance Portal

THE PROBLEM

As NCR volume grew, issues sat in an unstructured spreadsheet. They were slow to resolve, and it was difficult to find a pattern among repeated issues.

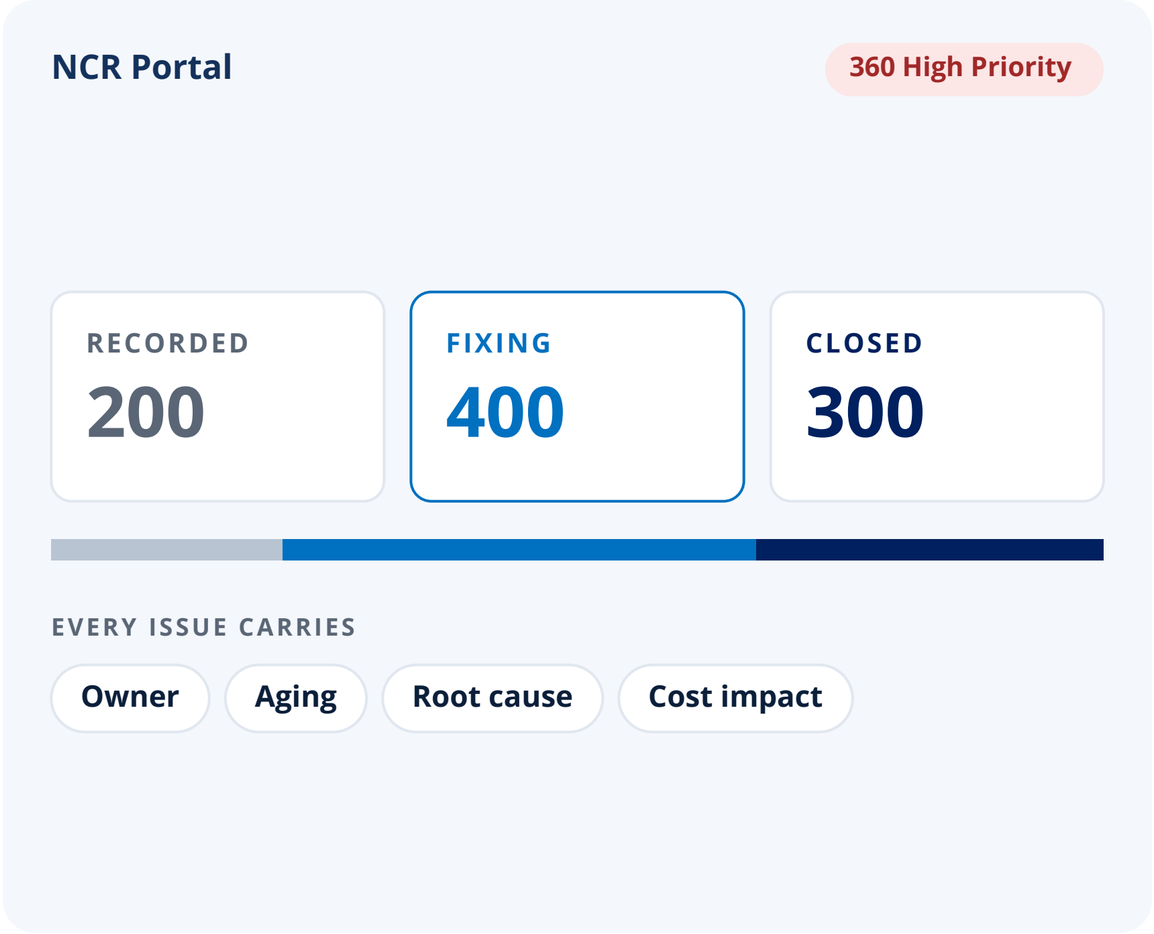
WHAT WE BUILT

We built a portal that structures intake, assigns ownership, and shows aging next to root cause and cost impact, so issues no longer sit unseen.

81%
weekly resolution, from 14%

57%
same-day, from 8%

Over T6M, weekly NCR resolution rose from 14% to 81% and same-day resolution from 8% to 57%.



> “ Keystone leads with listening to understand the problem before implementing... The tool is simple and easy to use, while giving us the insights to focus where it matters most. **VP of Quality**

Engineering Execution & Priority Dashboards

THE PROBLEM

Barely half the time, jobs released to production on time, and swings in throughput drove frequent delays and changes.

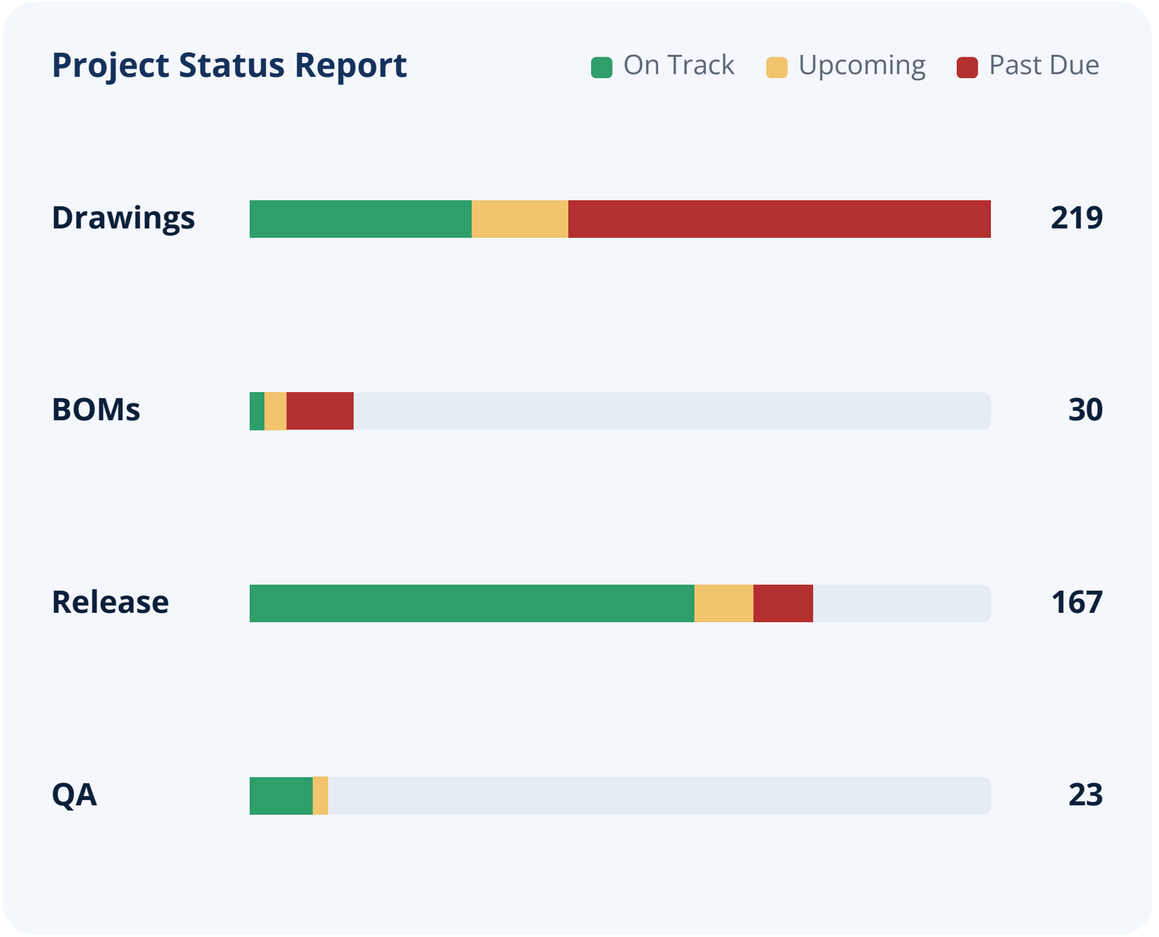
WHAT WE BUILT

We mapped the engineering process end to end, sized job complexity, and built target dates and risk logic. Then we developed automated dashboards to put priorities and performance in front of the team every day.

+48%

weekly throughput, Engineering to Production

Over TTM, avg. throughput from Engineering to Production increased 48% per week post dashboard rollout.



> "Dashboards made a noticeable difference in how we manage all active orders… the team can quickly see what needs attention and focus on the orders that could impact delivery. **VP of Engineering**

SKU Enrichment AI Model

THE PROBLEM

Inventory had doubled since the acquisition, and the item master lacked the attributes needed to segment inventory or support an MRP implementation.

WHAT WE BUILT

We built an AI model that pulls SKU attributes from vendor sites, catalogs, and public data, then accurately classifies and enriches every item record.

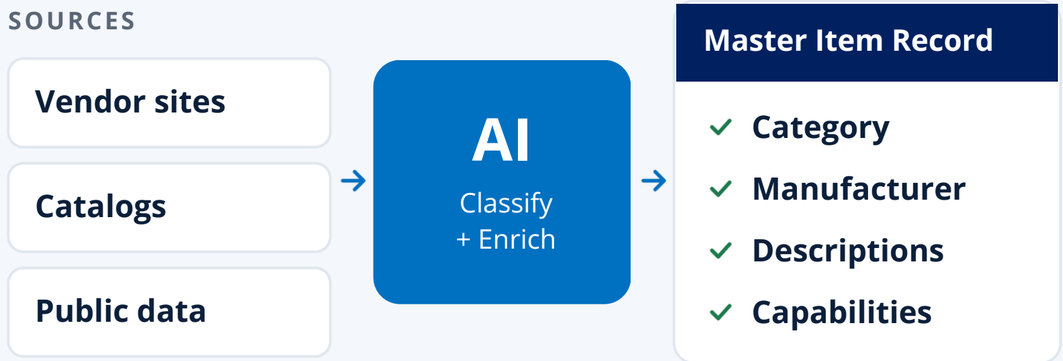
97%
vendor mapping, from 46%

90%
category coverage, from 62%

96%
validated accuracy

Across 15K SKUs, vendor mapping rose from 46% to 97% and category coverage from 62% to 90%, with 96% validated accuracy.

From scattered sources to a complete item record



WHAT IT UNLOCKS

- Inventory segmentation
- SKU rationalization
- Foundation for MRP