



Executive
Perspectives

From AI Assistance to Agentic Orchestration with Applied AI

Procurement

July 2026

Introduction

Procurement is at an inflection point. Applied AI is rapidly evolving from a support tool to an autonomous, agent-driven capability that can orchestrate and execute end-to-end workflows across the source-to-pay process.

The next wave of value is not expected to come from isolated copilots but from AI agents integrating enterprise data, supplier intelligence, and market signals to drive step-change improvements in savings, resilience, compliance, and speed. Yet, most organizations remain focused on fragmented use cases, limiting scale.

Leading organizations are moving toward an AI-first, agent-enabled operating model by focusing on four priorities:

- Emphasizing high-value, end-to-end workflows so AI agents can orchestrate across functions
- Building an AI-first stack that combines platform AI, specialized tools, and proprietary agents
- Redesigning the operating model for human–agent collaboration, with humans focusing on strategy and key decisions, while agents execute
- Capturing supplier-side value using AI agents for dynamic negotiations and better commercial models

This document outlines how Applied AI enables the shift from isolated AI use cases to scaled, agent-driven workflows that deliver consistent commercial impact.

**In this BCG
Executive Perspective,
we articulate the
vision for and value of
agentic procurement**

Executive summary | Procurement organizations should transition to an agent-enabled operating model

Applied AI is redefining how procurement operates through agentic AI

Procurement is under **pressure not only to generate more value but also to deliver it faster and across more spending areas because of** cost volatility and shifting supplier dynamics

Applied AI is moving from task-level support to **autonomous, agent-driven workflows** that orchestrate and execute across the end-to-end procurement life cycle

However, most organizations remain focused on copilots and isolated automation, limiting impact; **the opportunity is to deploy AI agents across end-to-end workflows** and move from productivity gains to execution at scale

Procurement functions can unlock value by moving to an agentic AI-enabled operating model

Capturing the value of **agentic AI requires procurement to transition to an AI-first, agent-enabled operating model**, moving beyond isolated tools toward an integrated foundation across data, technology, processes, and talent

At the core is an AI-enabled operating foundation built on six elements: **connected data and systems, a robust data and knowledge layer, AI capabilities and talent, an AI-first organization, strong process governance and change management, and cross-functional and ecosystem collaboration**

Together, these enablers allow procurement to scale **AI-driven workflows, improve decision making, and systematically unlock supplier value**, driving sustained impact for the company

What it takes to scale agentic AI in procurement

The challenge is no longer AI adoption, but **scaling agent-driven workflows and execution across the organization**

Leaders are moving beyond pilots and **systematically orchestrating workflows across sourcing, negotiation, and supplier management using AI agents**; at the same time, humans are steering decision making, prioritizing, and challenging where it matters most for output

Winning organizations scale **Applied AI through an integrated, agent-enabled operating model**, with a change process focused on taking people along on the future procurement journey while building technology in parallel

Procurement organizations need to shift their focus from siloed AI use cases to truly AI-first operations



From a point-based AI approach...

Individuals are the drivers, with digital tools used on selective tasks; AI incrementally boosts efficiency

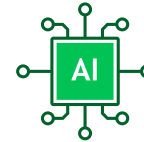


Siloed AI use cases built on fragmented processes

Key characteristics

- Fragmented, point-based AI use cases with limited integration
- AI focused on insights, not decision ownership
- Human-led processes with pilots challenging to scale

Source: BCG analysis.



...to an AI-first approach

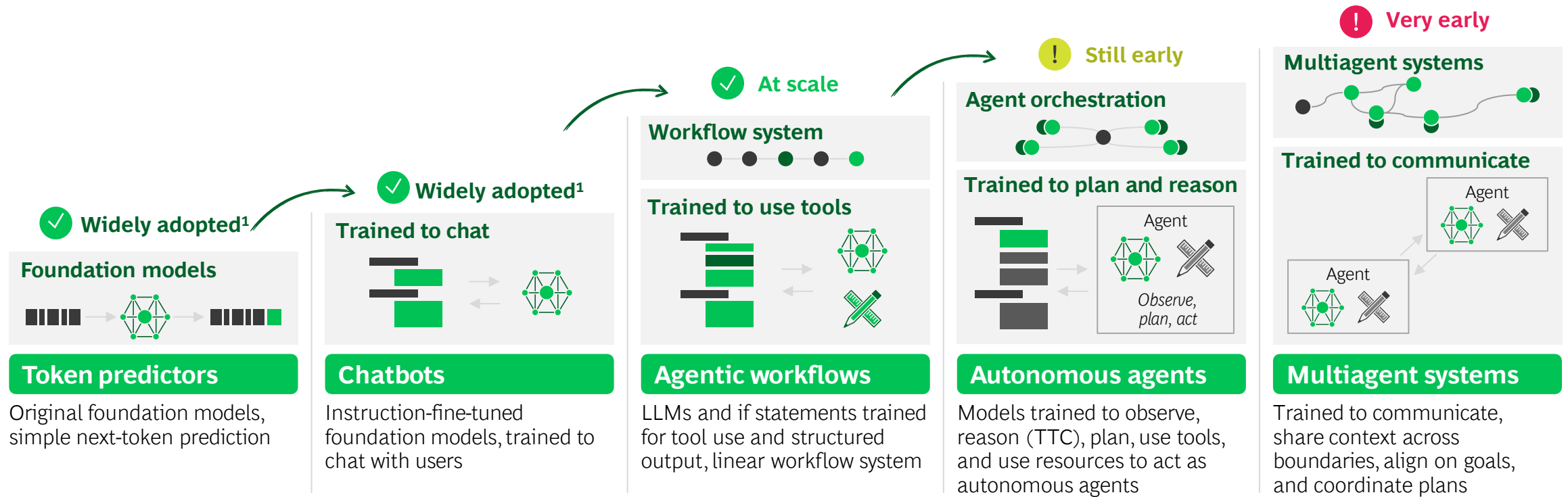
AI agents are the core drivers, with human oversight to close gaps and steer



Key characteristics

- End-to-end workflows redesigned for AI execution
- AI driven decisions within defined guardrails
- Integrated data, systems, and scalable agentic layer

Agentic AI has fundamentally moved from using conversational models to autonomous multistep execution



ILLUSTRATIVE EXAMPLES IN PROCUREMENT

- Draft RFx² documents and supplier emails
- Summarize contracts and supplier proposals
- pricing, SLAs, clauses)
- Query spending, suppliers, and contracts
- Explain price drivers and cost breakdowns
- Retrieve contract terms and compliance gaps
- Run RFx with supplier shortlist and bid analysis
- Benchmark bids vs. should-cost models
- Trigger supplier risk alerts with actions
- Recommend award scenarios
- Allocate volumes across suppliers within guardrails
- Identify savings opportunities
- Orchestrate end-to-end sourcing across functions
- Coordinate supplier risk response
- Continuously optimize category strategies

1. Solutions available plug and play through third-party tools and considered table stakes.

2. RFx is a collective term for procurement requests (e.g., request for information, request for proposal, and request for quotation).

Note: LLM = large language model; TTC = test-time compute; SLA = service level agreement.

Source: BCG analysis

Key trends are fueling leaders' shift to an agentic-enabled operating model

Key trends

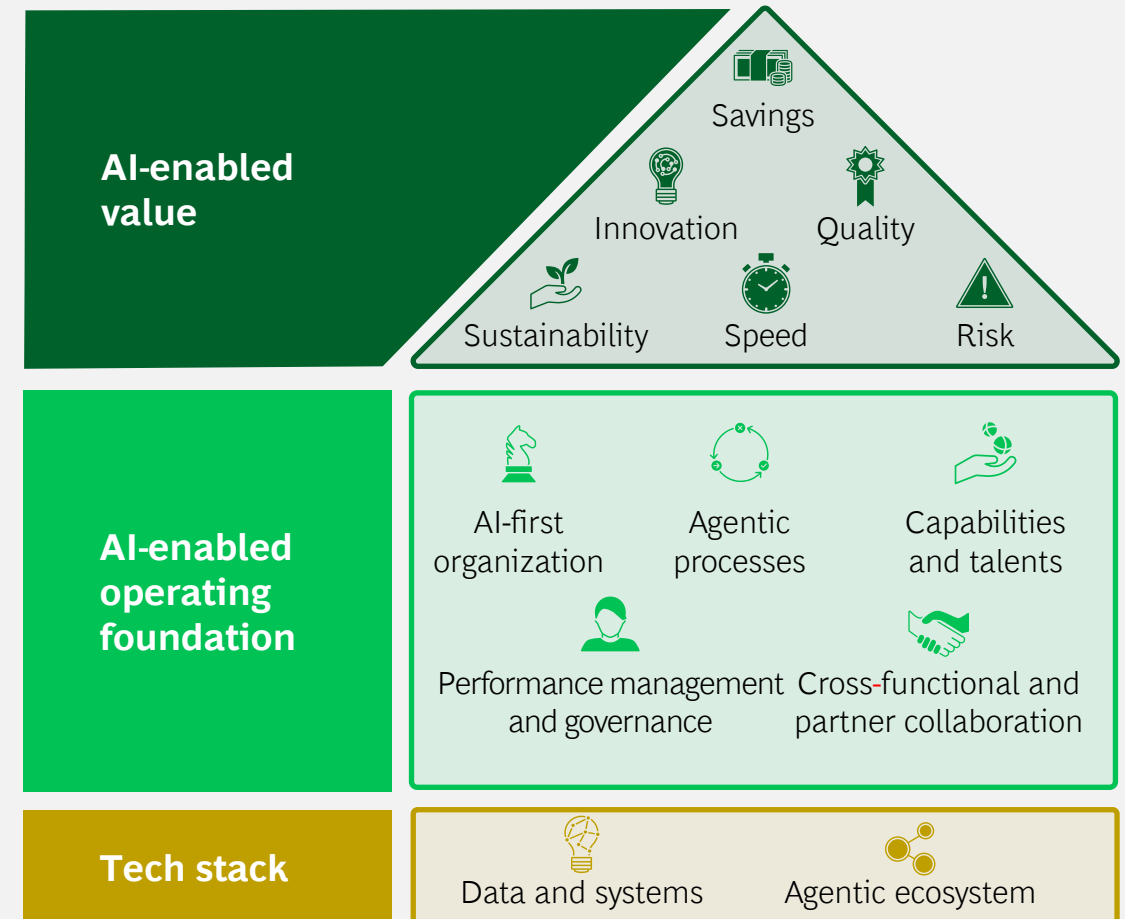
- Procurement is under sustained pressure from volatility, cost inflation, and rising business expectations
- Expectations are expanding beyond savings to resilience, sustainability, speed, and broader commercial impact
- This requires procurement to increase coverage and drive impact across more spending, suppliers, and commercial decisions

- The shift to AI-first processes and human-AI operating models
- Capabilities evolving to orchestrate end-to-end procurement workflows
- From manual execution to AI-driven decision making and automation

- Data and knowledge layers enabling scalable decision making
- Connected data and systems across the procurement ecosystem
- Digital backbone enabling scale through governance and integration

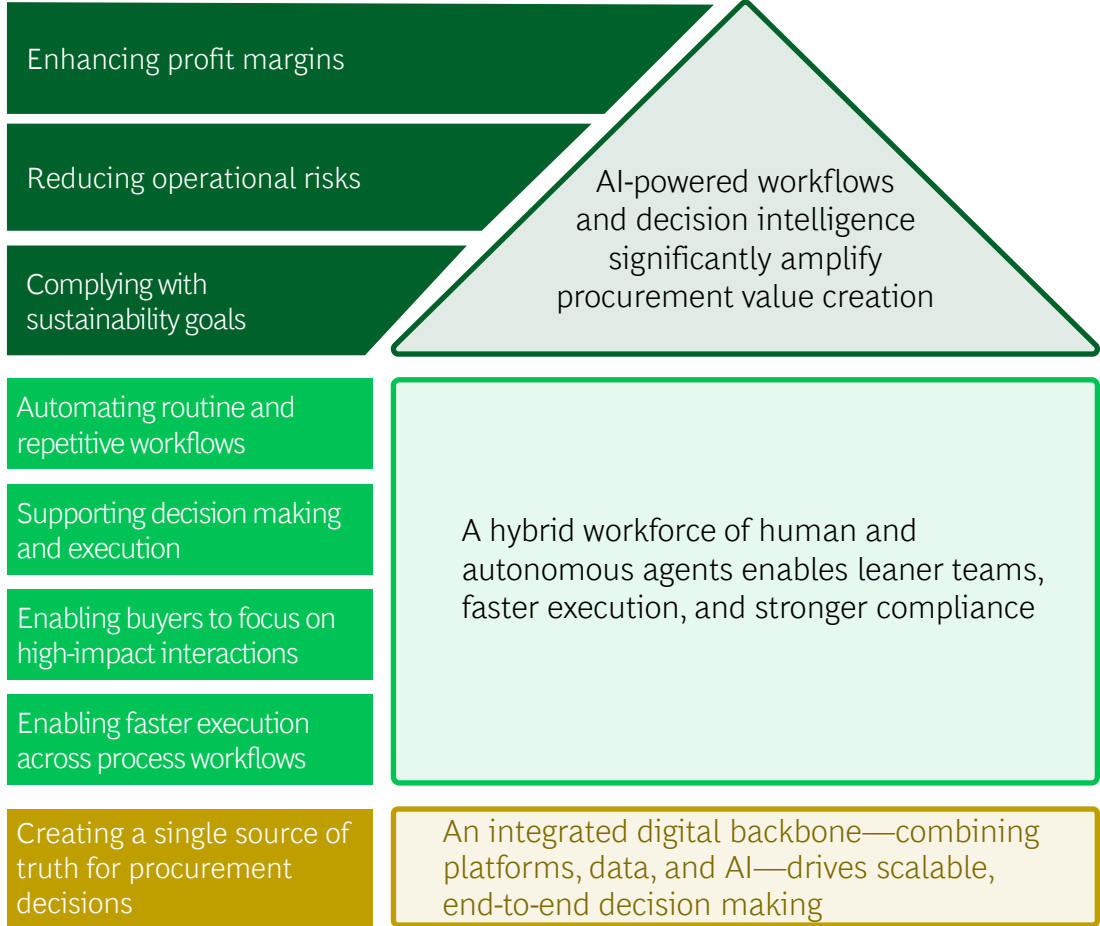
Source: BCG analysis.

BCG's procurement house



AI is transforming procurement outcomes, improving profits and mitigating risks

Agentic AI is revolutionizing the procurement house...



Note: OTIF = on time, in full.
Source: BCG analysis.

...and unlocking massive impact



Savings

+8%–15%

Value impact



Innovation

+100%

More supplier innovations



Quality

+5pp–15pp

OTIF, quality, and reliability improvements



Sustainability

–50%

Less CO₂ emissions



Speed

+30%–60%

Faster RFx, negotiations, and contracting



Risk

+5%–10%

Faster identification and mitigation of supplier risks



Process efficiency

20%–40%

Reduction in transactional procurement cost



Capacity

+60%

Freed up capacity



Compliance

+20%–40%

Contract and policy adherence

Organizations can unlock end-to-end value by using AI to orchestrate commercial and technical levers

AI-enabled value



**Value priority layer
(CPO led)**

Savings

Risk

Quality

Sustainability

Speed

Innovation

Levers



Commercially focused workflows

Tender push

Best-cost country sourcing

Make vs. buy

Dynamic pricing and index management



Technical- and demand-focused workflows

Variance reduction and consolidation

Specification optimization

Demand management

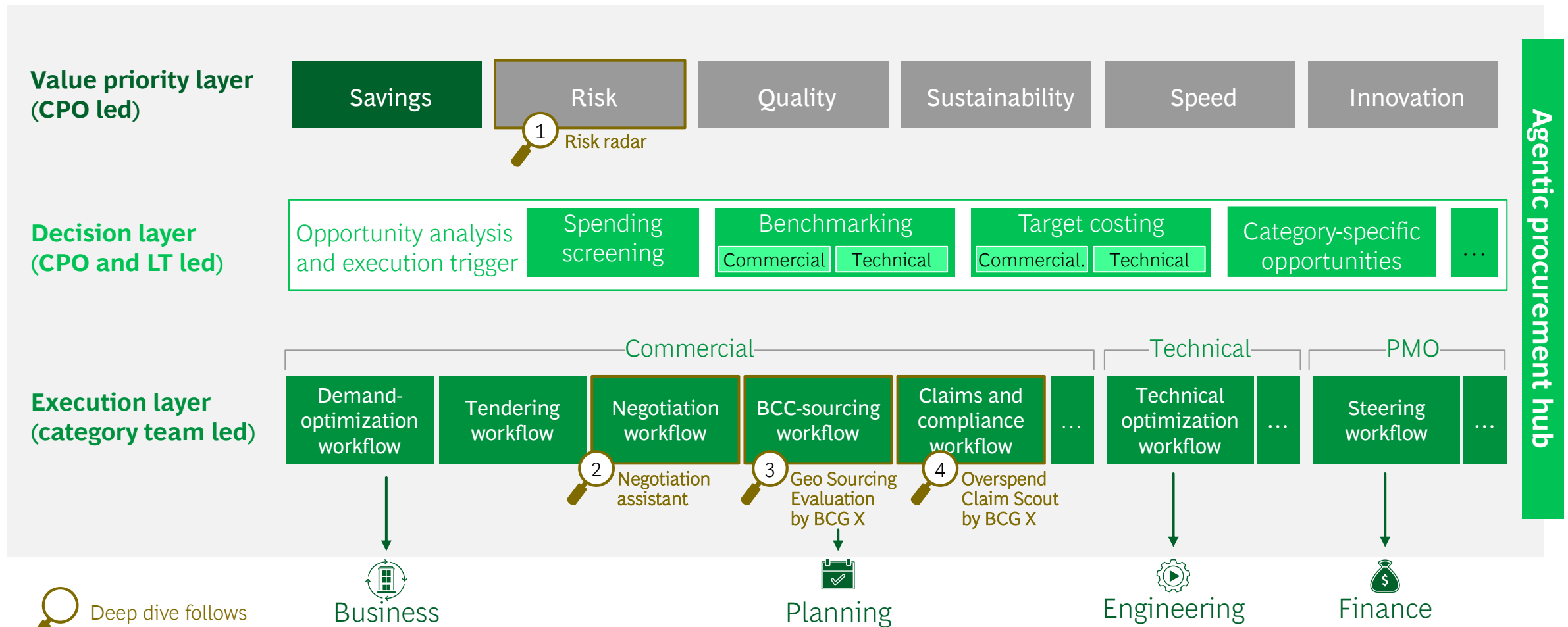
Life cycle and total cost optimization

Agentic procurement hub

Note: CPO = chief procurement officer.
Source: BCG analysis.



AI can connect decisions and execute across procurement's layers



Note: LT = leadership team BCC = best-cost country; PMO = project management office.
Source: BCG analysis.

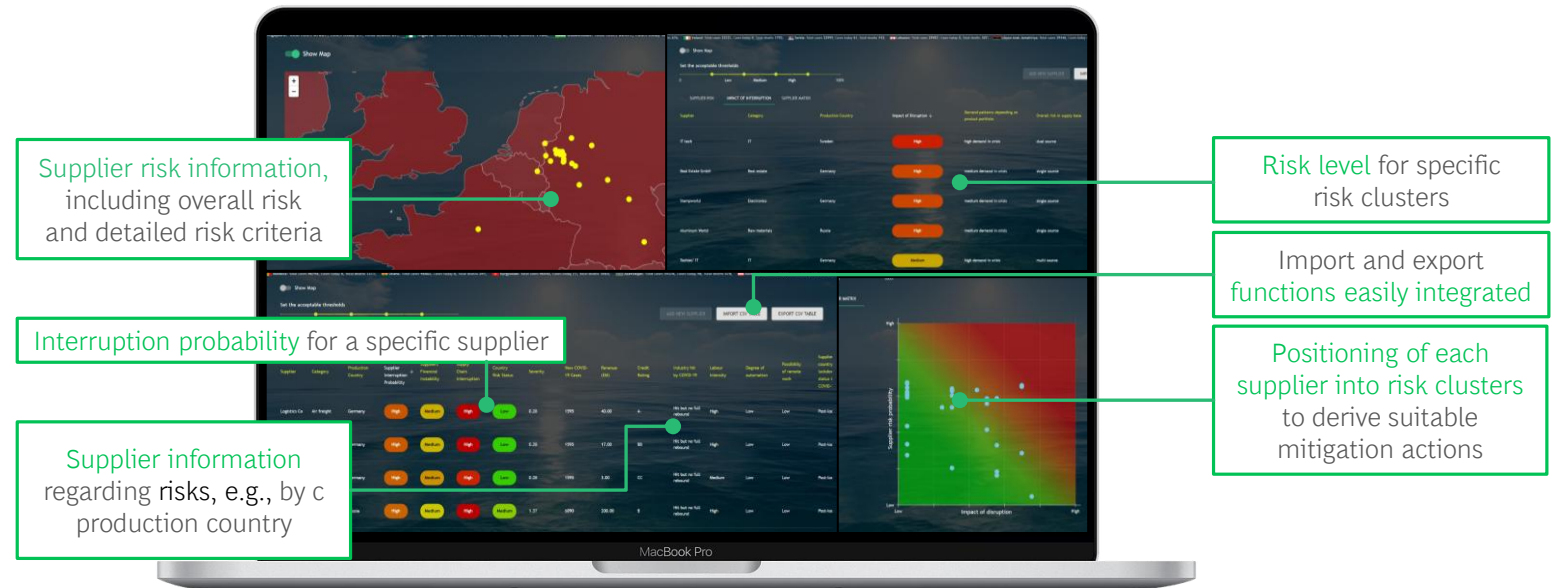
Organizations can identify, prioritize, and control potential interruptions by using an AI platform that monitors risk

Description

AI risk radar is an AI-driven platform that integrates real-time data with dynamic risk scoring to offer continuous visibility into potential disruptions

Impact

+80% Higher transparency on supply risks



Functionality

End-to-end AI risk visibility

Provides a comprehensive view of key risks (e.g., data, compliance, and model behavior) across the AI portfolio, enabling early identification and prioritization

Risk-based governance

Applies a differentiated governance approach, focusing scrutiny where risk is highest to enable faster, better-informed decisions

Actionable mitigation and guardrails

Translates insights into clear controls and guardrails for safe, compliant, and scalable AI deployment

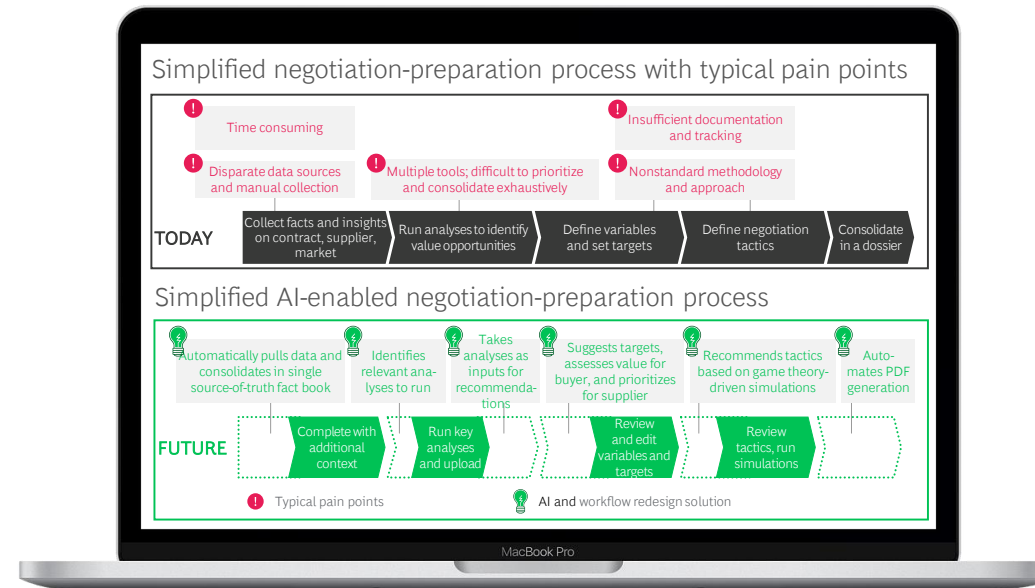
AI enables more effective supplier negotiations by turning the process into a structured, data-driven workflow

Description

AI-enabled negotiation assistants offer revolutionary features to prepare for supplier negotiations

Impact

Up to **4%** Incremental savings vs. historical levels



Functionality

Single source of truth for data on category, supplier, and market

Unified data backbone consolidating insights, flexibly integrating multiple sources

Advanced, data-driven target-setting recommendation engine

Automated variable extraction and AI-powered target setting with embedded best practices

Simulation rollouts and tactics suggestions

Agentic simulation of scenarios to output optimal narrative, tradeoffs, and arguments

AI drives best cost country sourcing decisions through real-time analysis and scenario modeling

Description

An AI agent leverages global cost benchmarks and internal data to identify, size, and execute sourcing shifts

Impact

Buyers can evaluate and size options and trigger best cost country sourcing actions



Functionality

AI-powered opportunity mapping

Agent integrates cross-category benchmarks to identify and size sourcing opportunities by product and country

Scenario-driven, dynamic analysis

Category managers test assumptions (e.g., dual sourcing and commodity shocks), with real-time recalculation and updated opportunity views

From insight to execution roadmap

Agent translates insights into action, balancing savings, resilience, and feasibility and generates structured roadmaps from supplier selection to negotiation

AI helps organizations detect and recover overpayments to suppliers

Description

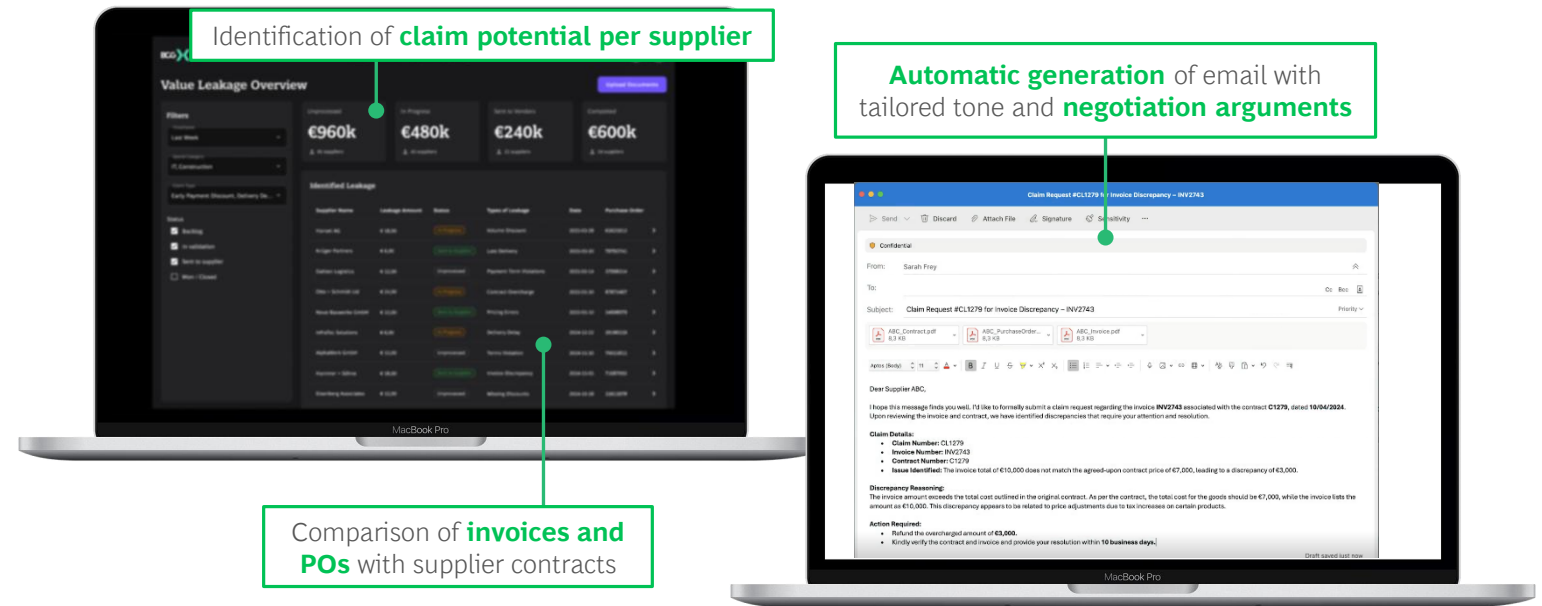
An AI agent identifies discrepancies among invoices, POs, and supplier contracts to claw back unjustified overpayments, and then it provides evidence packs and cost-reduction letters to implement

Impact

0.5%–1%

Savings on claimable spending, ability to analyze value bucket at scale

Note: PO = purchase order.
Source: BCG analysis.



Functionality

Automated claim opportunity identification

Scans large volumes of procurement and transaction data to detect overcharges, missed rebates, and other recoverable spending

Analytics-driven value capture at scale

Applies advanced analytics and GenAI to uncover hidden recovery opportunities, typically unlocking about 0.5%–1% of addressable spending

From insights to executable claims

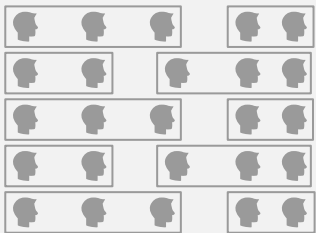
Translates findings into prioritized, actionable claims to accelerate value recovery



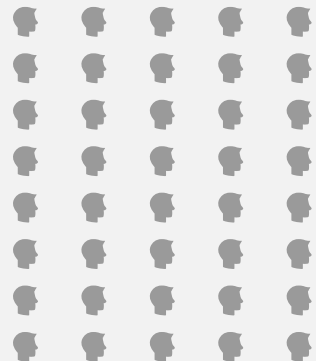
Agentic AI can free up about 60% of a procurement staff's availability to focus on more strategic work

Procurement today 100% of head count

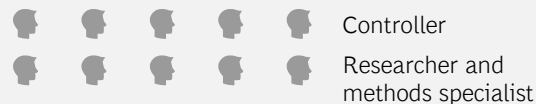
Strategic buyer



Operational buyer



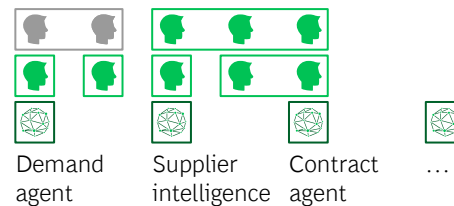
Support functions



Note: P2P = procure to pay.
Source: BCG analysis.

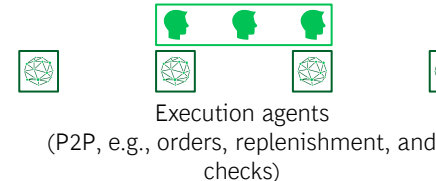
Procurement with AI ~40% of total head count

Strategic buyer



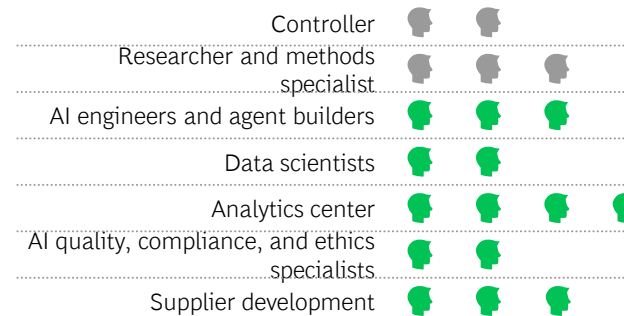
- Humans (category teams) initiate, steer, and orchestrate execution in agentic workflows, driving strategy, high-stakes negotiations, and physical supplier interaction

Operational buyer



- Executional oversight hub manages exceptions, physical interventions, and continuous improvement of agent-driven workflows

Support functions



- Agent builders and workflow designers develop and optimize AI agents
- AI governance ensures compliant and responsible agent decisions
- Supplier development helps suppliers use AI effectively, ensuring they meet company's standards and deliver value



Agents autonomously run end-to-end operations, freeing about 60% capacity for strategic work

Humans shift to orchestration and AI governance, alongside negotiations and physical interactions with suppliers and business stakeholders

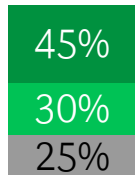
Agentic AI can support, automate and drive processes in key procurement activities



Agentic AI can augment and automate work

Human driven Automatable AI driven

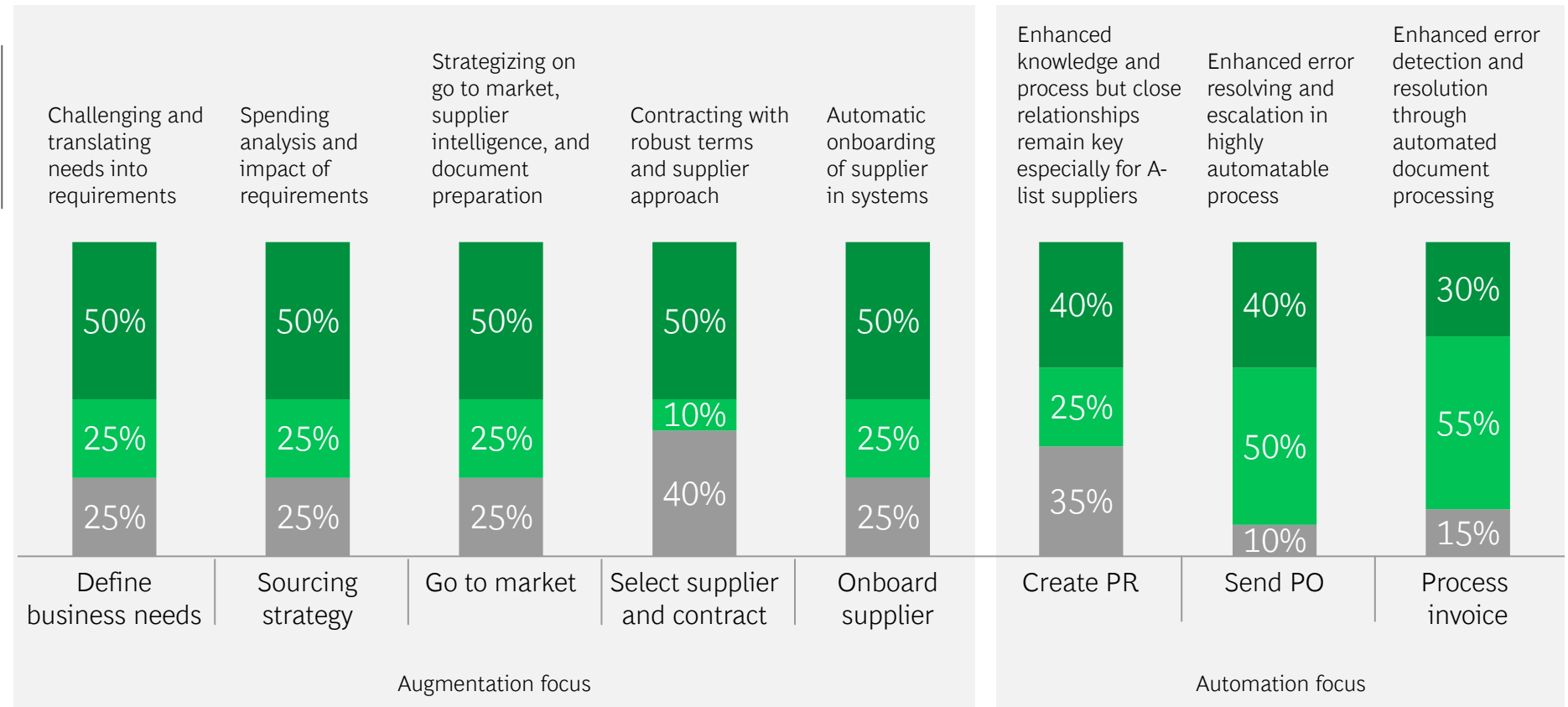
Overall procurement function



Agentic AI can be used to augment and support (but not replace) procurement activities for forward-thinking teams



AI value added

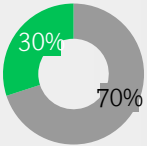


Note: PR = purchase requisition.
Source: BCG analysis.



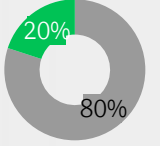
The creation of AI capabilities within the existing organization, in tandem with AI upskilling, is needed for success

Negotiator



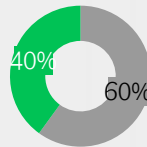
- Design end-to-end sourcing and negotiation workflows
- Define agent vs. human interventions
- Oversee and optimize agent-led negotiations
- Step in on high-value or complex cases

Diplomat



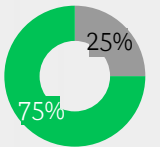
- Align business, procurement, and AI needs
- Translate demand into data-driven requirements
- Challenge specifications with business
- Manage escalations and balance tradeoffs

Category and value strategist



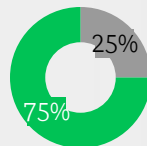
- Set category strategy and value priorities
- Translate business needs into process logic
- Focus teams on high-value supplier choices
- Guide category decisions and tradeoffs

AI performance manager



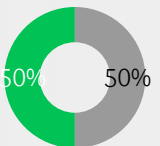
- Validate AI and agent outputs
- Track performance of agent-driven decisions
- Define rules, targets, and learning loops
- Manage exceptions, not routine analysis

AI and GenAI engineer and data steward



- Ensure data integrity
- Engage in agent and tool development
- Adopt technology and implement
- Scout for technology

Market and intelligence integrator



- Use AI for continuous supplier and market scanning
- Combine external and internal data sources
- Validate AI insights for business relevance
- Focus teams on strategic insights



Existing capabilities New capabilities



Leaders should equip their organization with KPIs for an AI-enabled future

Illustrative

Savings realized YTD

\$42.5M

95% of target, +8.2% YoY

Share of spending actively managed

78%

+4pp QoQ

Requisition-to-PO cycle time

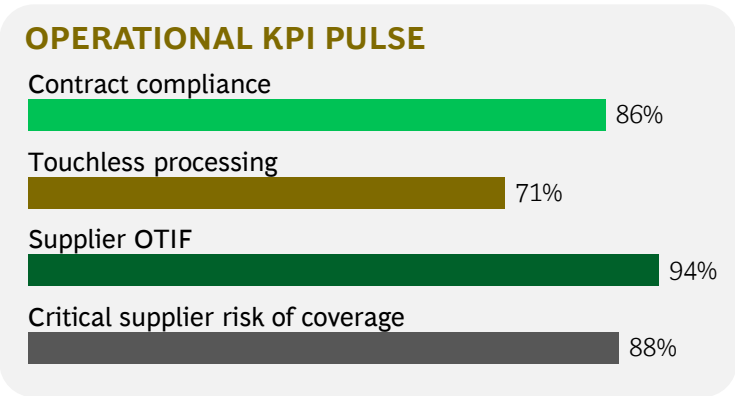
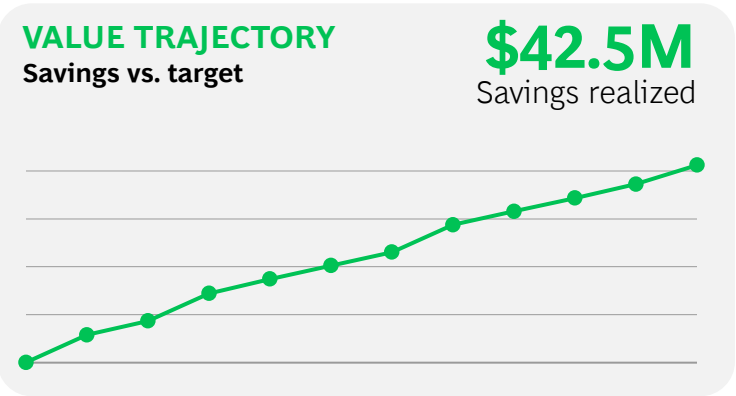
4.2 days

-0.8 days vs. baseline

AI adoption rate

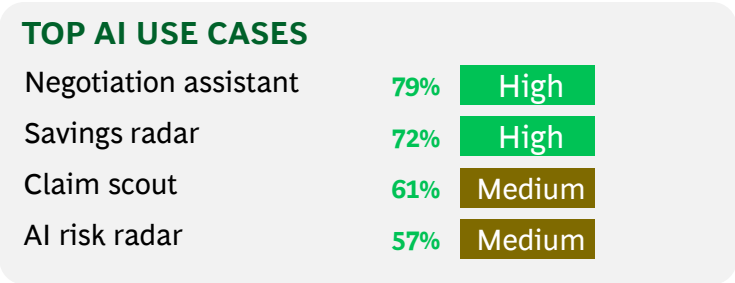
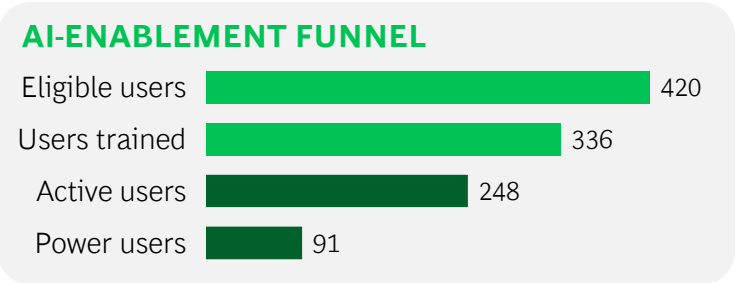
67%

+11pp in 90 days



AI ADOPTION MATRIX

Team	Use	Impact
Direct	82%	74%
Indirect	68%	72%
Capex	54%	61%
Shared services	91%	84%
Procurement excellence	63%	66%



ACTION CENTER

Medium Capex AI uptake Owner: Digital lead Embed copilots in sourcing workflow	Medium Compliance leakage Owner: Procurement Expand guided-buying coverage	High Supplier risk alerts Owner: SRM Lead Review top 15 strategic suppliers
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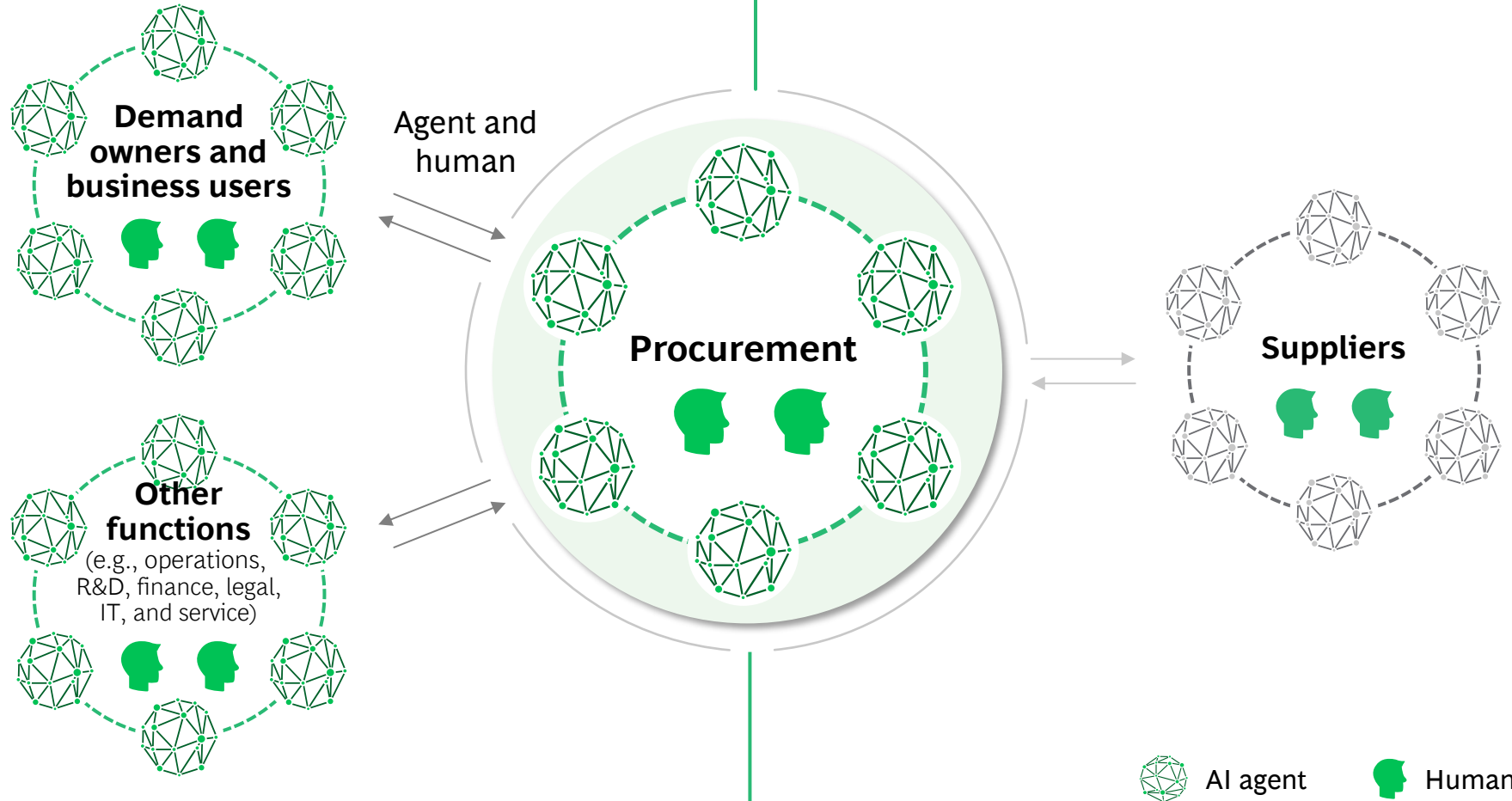
Note: SRM = supplier relationship management.
Source: BCG analysis.



Agentic interfaces require new ways of collaborating among internal and external stakeholders

Internal stakeholder

External stakeholder



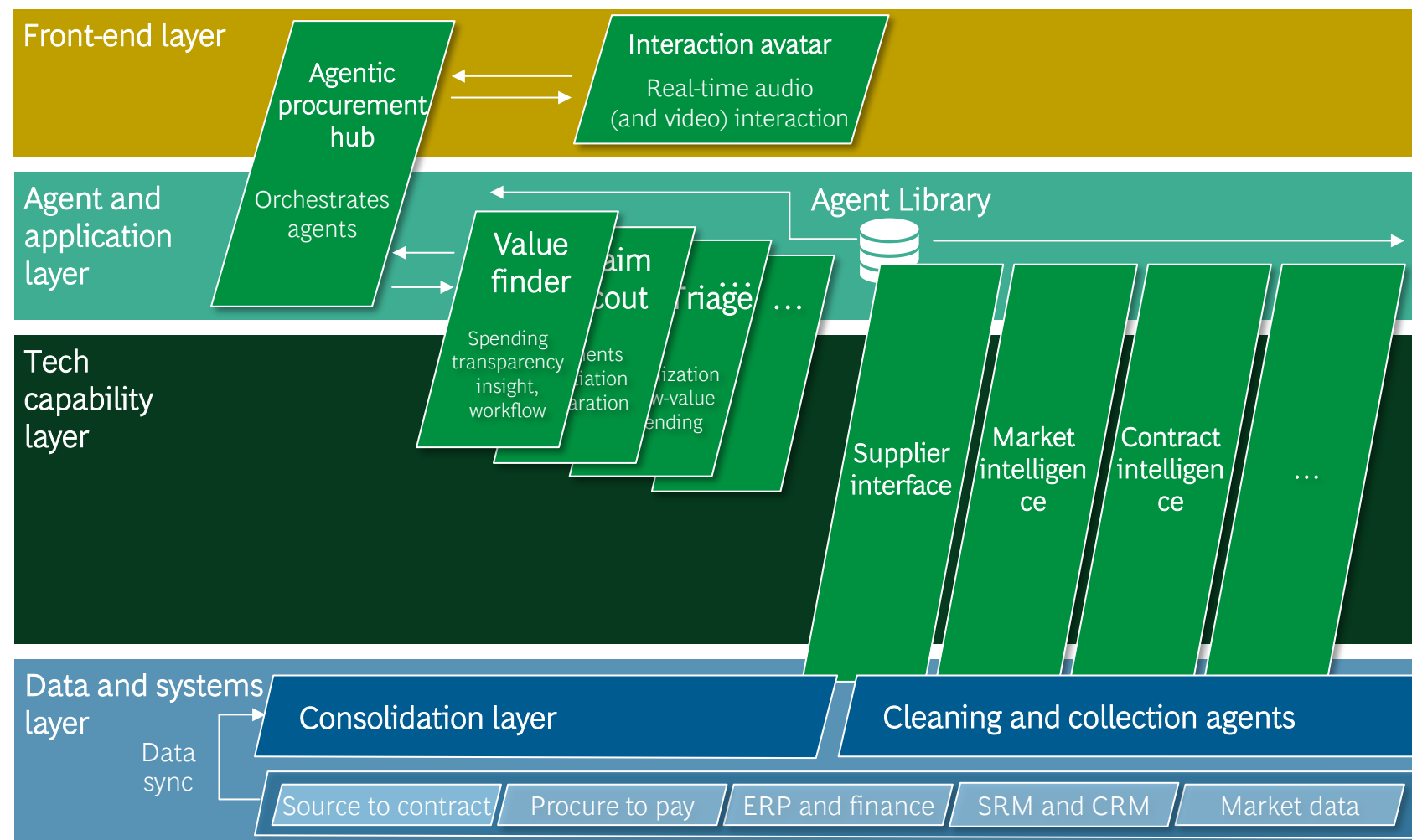
Maintain human oversight and governance in automated agent ecosystems

Empower teams to steer and intervene in agent-driven processes

Drive continuous improvement through clear ownership and performance management of agents



Organizations need an agentic, flexible architecture to scale AI-driven workflows



One integrated business interface to access insights, trigger workflows, and supervise outcomes

Agents and apps activating procurement use cases across decision and execution workflows

Scalable AI services converting raw data into reusable capabilities for orchestration and governance

Internal and external data supplying the stack as foundation representing end-to-end view on categories and supply chain; agents support quality assurance and actuality of information

Note: ERP = enterprise resource planning; CRM = customer relationship management.
Source: BCG analysis.



Purpose-built agents can address the root causes of poor data quality

Current situation



Poor data quality undermines **agent performance**



Data availability is mostly episodic rather than continuous; no digital twin available



Manual data collection ties up critical **employee capacity**



Automated **quality control** is lacking at data entry points

Note: Q&A = question and answer.
Source: BCG analysis.

Data collection agent

An agent combining data collection with closed-loop follow-through

Enables interactive **voice and chat** for introductions and Q&A



Guides completion of **data templates** for integrated systems



Provides real-time feedback on **data quality** during input process



Automates **appointment scheduling** for data collection with stakeholders



Automates scheduling of **review sessions** with experts for validation



Automates follow-up and **task escalation** throughout the hierarchy

Data cleansing agent

A content-oriented agent screening data inputs for rule violations and plausibility issues

Flags inputs that violate **predefined rules**, limits, or format requirements



Automates **escalation mechanism** and integrated **task management**



Challenges inputs that are statistically unlikely or inconsistent with **historical benchmarks**



Enables a live feed into decision agents, signaling current **data confidence** and **freshness levels**

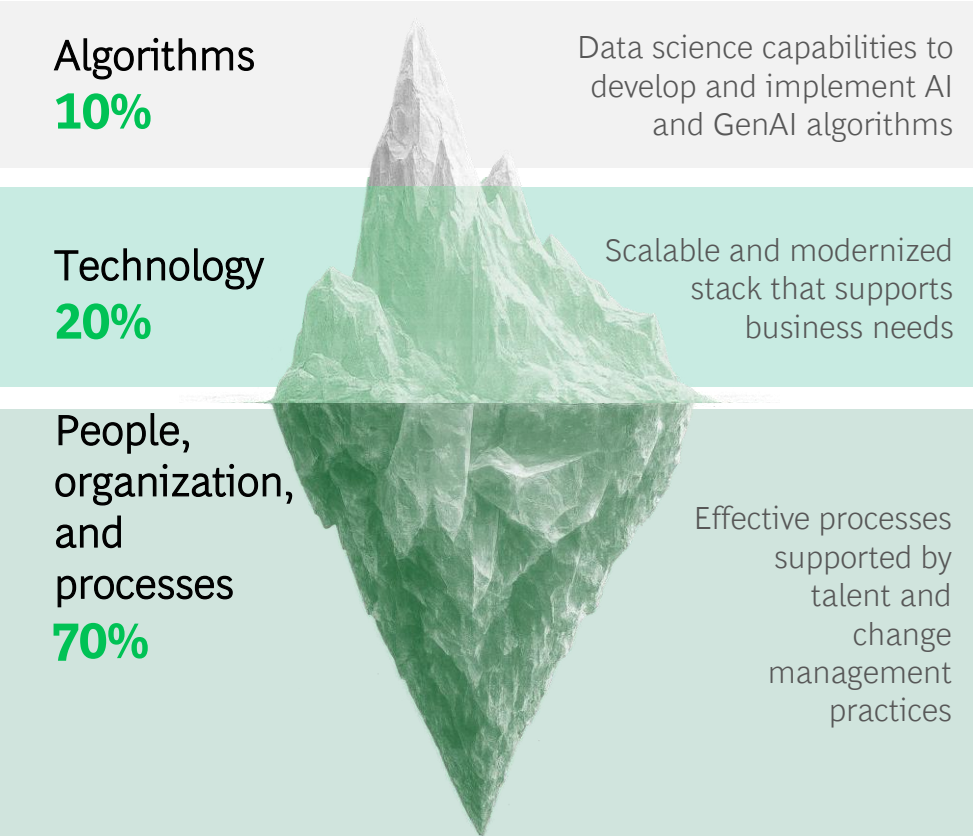
Modular integration is BCG's recommended approach for replacing the tech stack



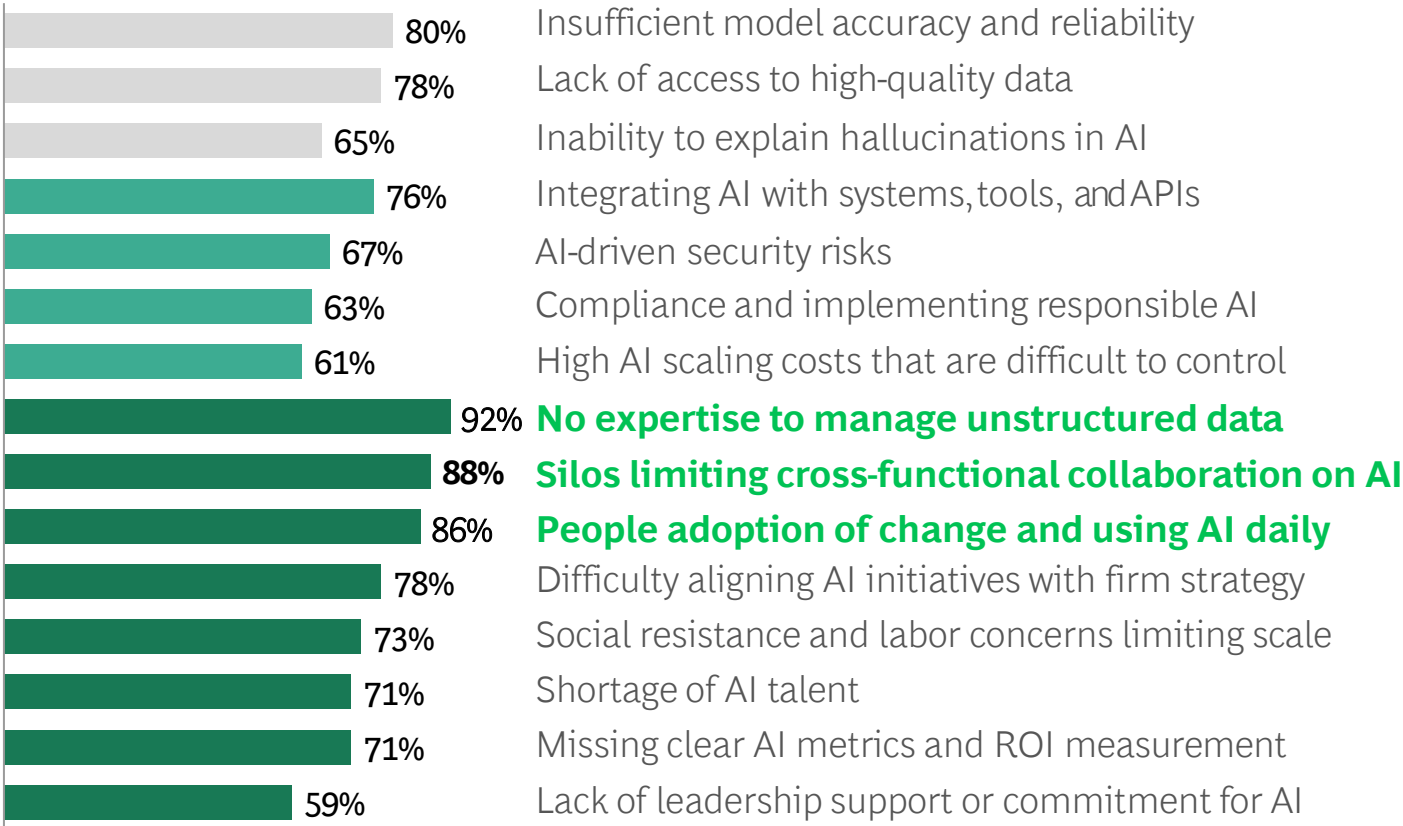
Spectrum of approaches

	Greenfield	Modular integration BCG recommended
Description	Build a new, future-ready tech stack from scratch , designed for target capabilities, and switch over when it goes live	Modernize and modularize the tech stack incrementally by replacing and integrating prioritized elements
Magnitude of replacement	Full stack replacement , with ERP, SRM, CLM, and P2P tools entirely replaced by new core systems	Selective replacement , keeping legacy systems as the backbone and selectively replacing or adding modules
Sequence of replacements	Comprehensive roadmap locked upfront , detailing foundation first, then core systems, then advanced capabilities	Dynamically sequenced , with the next module selected based on value delivered and organizational readiness
Evaluation focused on major advantage and disadvantages	● Full tech flexibility Complete freedom in system and architecture choice ● User acceptance High change burden due to full system replacement ● Cost Significant upfront investment and long payback period	● Speed to value Module changes live within short time frame ● User adoption Incremental changes reduce resistance in organization ● Interface risks Complexity grows with number of integrated modules

AI alone is not enough—70% of a transformation’s success depends on people, the organization, and processes



Share of respondents key challenges¹ (%²)



1. Which of these challenges hinder adoption and scale of AI in your company? 2. Percentage of respondents who agree and strongly agree.

Note: API = application programming interface; ROI = return on investment.

Source: BCG Build for the Future 2025 Global Study (n = 1,250).

Organizations should build the agentic AI engine while continuing to deliver business value through AI use cases

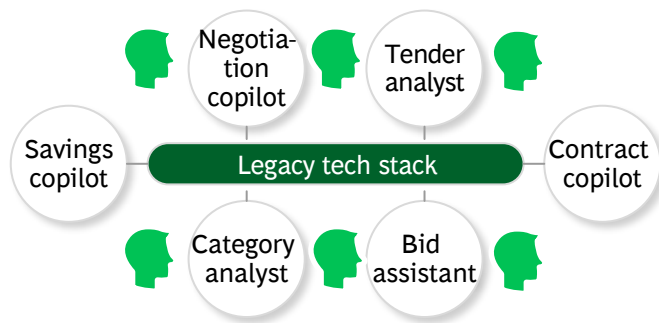
Current: Two worlds

Capture quick wins using existing systems and use cases

AI use case focus

High-impact AI use cases on the current tech stack supporting individual activities

Focus on immediate savings and efficiency gains

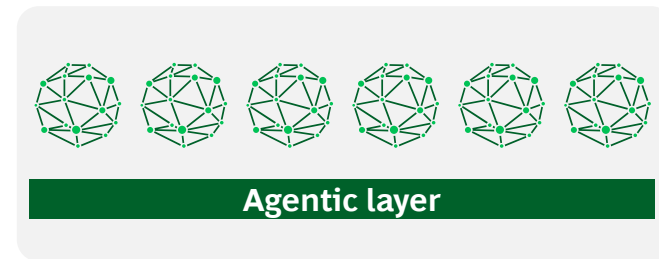


Build the agentic foundation in parallel

Agentic AI tech stack

Establish a scalable agentic AI layer (AI-driven automation and decision support), accessing current data and knowledge

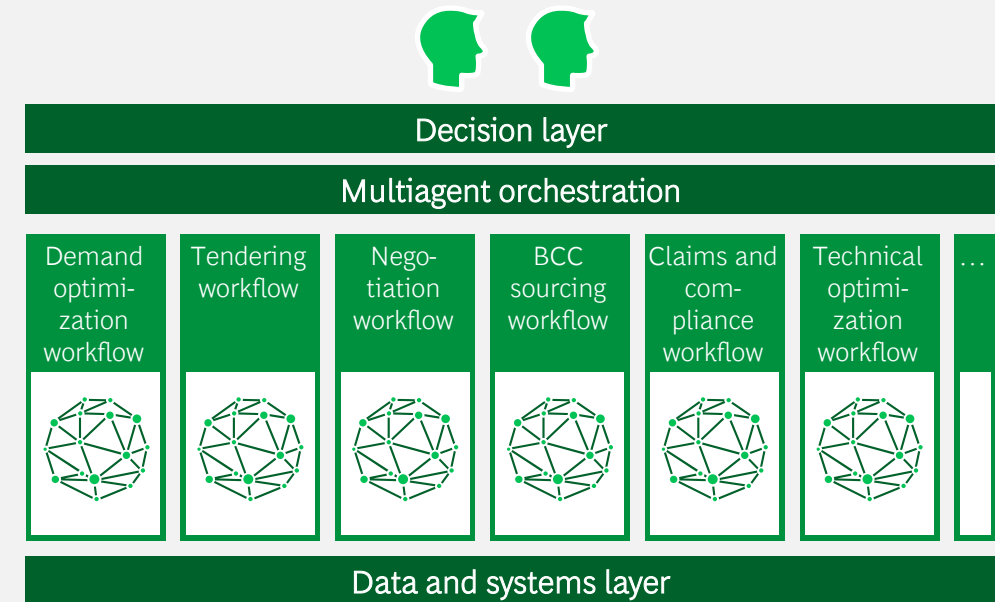
Develop AI-first operating model and workflows



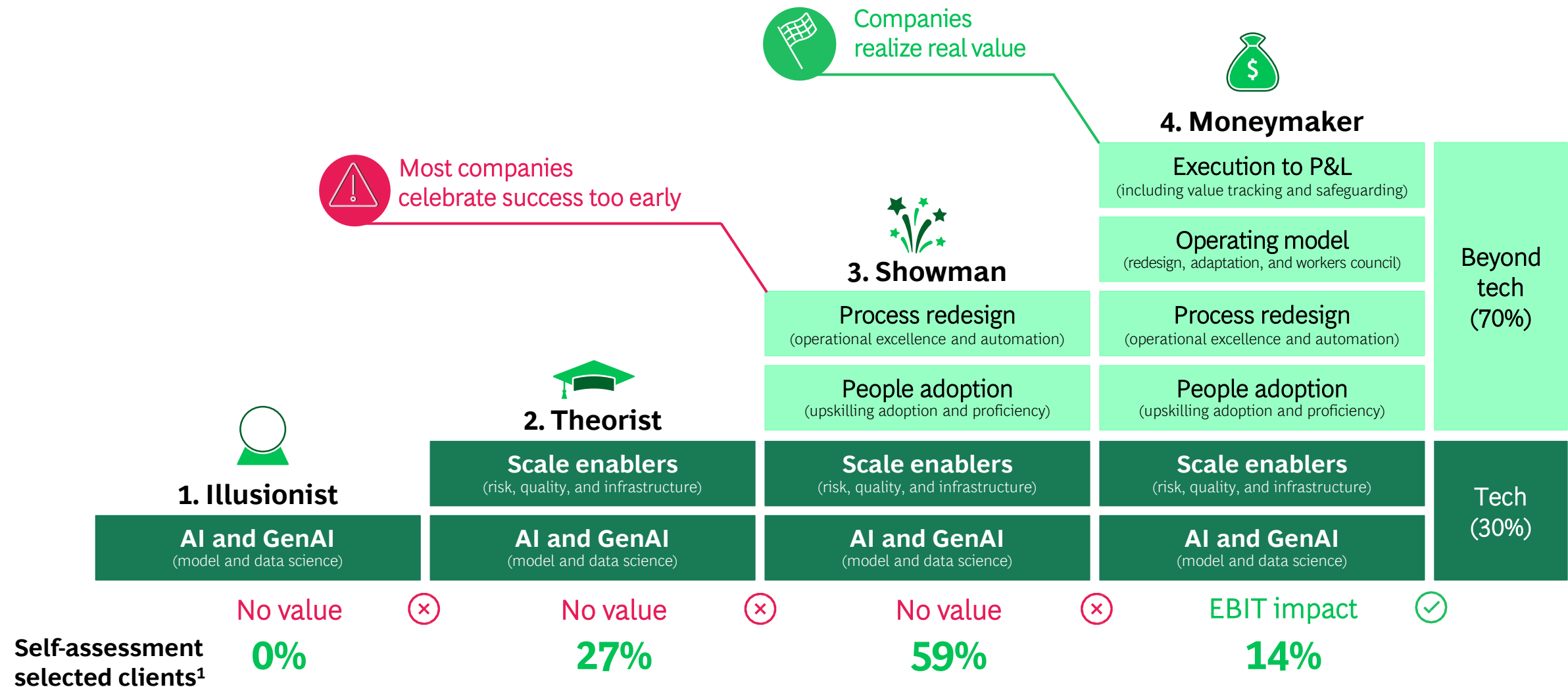
Enable switch

Near-term future: Switch and integrate

Scale and integrate with AI agentic layer



Most companies celebrate AI pilots too early, and only 14% achieve real EBIT impact



1. BCG survey conducted with the participants of the BCG (Gen)AI roundtable.

Strategic clarity and Applied AI turn isolated use cases into end-to-end transformation



Many software vendors (...) seemed focused on single use cases.(...) Real value from agentic AI will come from an agentic mesh."¹

Surinder Thind
Jefferies



We don't lay 100 eggs and see what happens. We have a small number of offspring, like mammals, and then you need to give them a lot of attention."²

Roelof Botha
Sequoia Capital



Strategic intent

Opportunistic initiatives:
hundreds of use cases

Address a specific process pain point

Game changers:
function transformations

Apply AI where it matters most to the **organization's strategy**



Impact

Limited EBIT-impact

Significant EBIT-impact, self-funding over time



Functional breadth

Task-specific (single use cases)

End-to-end or multifunctions (**string of pearls**)



Level of transformation

Deploy off-the-shelf tools

Reshape end-to-end process



Governance

Bottom up to **serve individual needs**

Centrally driven to serve strategic priorities

1. Financial Times, November 2025. 2. TechCrunch, November 2025.



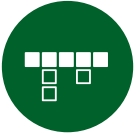
Now is the time to move from AI pilots to AI-driven procurement at scale

- 1 | Copilots are not enough:** AI copilots improve productivity, but the next wave of value comes from AI embedded in workflows that support decision making and execution
- 2 | Prioritize high-impact procurement workflows:** Focus on areas with the highest commercial leverage, such as sourcing, negotiation, supplier risk, and intake orchestration
- 3 | Redesign procurement around workflows, not tools:** Move from isolated use cases to integrated, end-to-end, AI-enabled workflows that connect data, decisions, and execution across source to pay
- 4 | Build the foundation for scale early:** Invest in data integration, technology architecture, and governance to enable scalable deployment of AI across procurement workflows
- 5 | Scale toward an AI-first operating model:** Start with high-value use cases, demonstrate impact, and expand into an integrated, AI-enabled procurement operating model over time



The competitive advantage comes from embedding AI into procurement workflows, not from isolated use cases

Case example 1 | A manufacturer achieved more than 50% time efficiency in procurement processes with AI



Approach

- Hosted **workshop** with purchasing and sales teams
- **Prioritized use cases** based on client's tech cluster and time to value
- Shortlisted three use cases for **rapid prototyping**
- Developed **implementation roadmap** with team
- Built and **rolled out all three tools within 12 months**



Outcome highlights

- **Knowledge management:** AI access to internal knowledge, boosting procurement quality and productivity
- **Offer analyst:** Standalone tool to compare and summarize offers via Amazon, Microsoft Azure, and OpenAI
- **Tender assistant:** Automates tender creation and review via embedded Microsoft Word plug-in

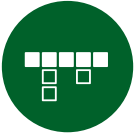
Company

- Global OEM
- **Over \$160 billion in revenue**

Impact

Tendering time reduced by **50%** and **search for internal knowledge** by **50%–75%**

Case example 2 | A hospital system unlocked \$20 million to \$40 million in run-rate savings by enhancing category strategy with agentic AI analytics



Approach

- Built **agentic AI analytics layer within category strategy** across large SKU-based categories (medical supplies and IT hardware)
- Combined AI agent with category expertise to **interrogate fragmented and uncategorized supply chain data** and surface execution-ready pricing and demand-driven savings opportunities



Outcome highlights

- **Same-SKU price harmonization:** About 50% of spending on common SKUs varied by roughly 5% across sites, unlocking \$5 million in savings
- **SKU rationalization:** Identified 30% savings on commoditized medical supplies (bed pads, dressings, gowns, and gloves)
- **Rapid benchmarking for negotiation targets:** About 55% of spending was priced above median, averaging roughly 5% higher despite client being ten times larger than peers

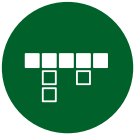
Company

- Government-funded hospital system
- **Over \$5 billion in revenue**

Impact

Identified **\$20 million to \$40 million in savings opportunities** across medical supplies and IT hardware categories

Case example 3 | A large beauty products company identified 10% to 20% in cost-reduction potential on \$150 million in spending



Approach

- Executed **rapid AI deployment** integrating spending and supplier data
- Developed over **15 rules-based use cases** to identify savings levers
- Delivered **diagnostic in less than two weeks** with PR-level recommendations
- Established **cross-functional teams** across regions and brands
- Defined **roadmap from PoC to scale** and deployed multiple **AI agents**



Outcome highlights

- **Spending visibility:** Created visibility on \$150 million of addressable spending with 10% to 20% reduction opportunity
- **Decision support:** Enabled real-time reviews of discretionary spending before PO conversion
- **Optimization levers:** Identified supplier consolidation opportunities and detected budget-leakage risks (e.g., early PO creation ahead of next fiscal year)

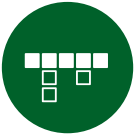
Company

- Large multinational beauty products company
- Broad, multi-brand portfolio

Impact

Unlocked **10% to 20% cost-reduction potential on \$150 million spending** by enabling real-time spending control, supplier consolidation, and budget-leakage prevention

Case example 4 | A global CPG company deployed a negotiation assistant and unlocked 1-2% incremental savings



Approach

- Deployed **GenAI-powered negotiation assistant** integrating supplier, spending, and contextual data
- Established **unified supplier intelligence layer** (dashboard and chatbot)
- Applied **advanced analytics, GenAI, and game-theory simulations** to derive optimized negotiation strategies
- Enabled **end-to-end negotiation preparation** with intuitive UI, scenario exploration, and dossier export



Outcome highlights

- **Transparency:** Consolidated supplier data and enriched it with actionable insights across categories
- **Decision quality:** Generated data-driven negotiation recommendations using advanced analytics and simulations
- **Execution enablement:** Improved buyer effectiveness via guided preparation, interactive chatbot, and structured dossiers

Company

- Large global CPG player
- **Over \$20 billion in revenue**

Impact

1-2% incremental savings and improved **negotiation quality** through data-driven and scalable decision-support system

Note: UI = user interface; CPG = consumer packaged goods.

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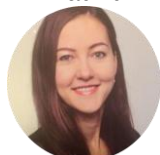
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