



Transforming Product & Portfolio Management Through Responsible, Human-Centric AI

Background

A global medical technology company with a broad portfolio of medical devices, instrument platforms, and reagents faced growing operational strain within its development organization. While teams across engineering, regulatory, finance, and operations demonstrated strong technical capability and collaboration, core development workflows remained manual and fragmented. These inefficiencies consumed scarce resources, increased compliance risk, and slowed product timelines—limiting the organization's ability to scale innovation in a highly regulated environment.

Recognizing that its expansive digital footprint represented an opportunity, leadership identified that AI could reduce operational friction, strengthen cross-functional execution, and refocus teams on high-value work. The company partnered with **Syner-G's Strategy and Transformation team** to launch a targeted AI transformation to strengthen its R&D innovation portfolio and enable more efficient, scalable execution.

Project Scope & Solution

Using its **3D Intelligence (3Di™) methodology**, Syner-G partnered with the PMO, Finance, and Product teams to transform critical development workflows by combining digital capability design and AI technologies with intentional workforce engagement. Teams were engaged as co-creators — shaping future-state processes and redefining their roles within AI-augmented workflows.

The result: AI-designed ways of working centered on people, not technology.



Define



Design



Deliver

Syner-G's 3Di Approach

1. Define
Anchored AI use cases in measurable business value

Each functional team identified their key business drivers and objectives. Then current state development workflows were mapped end-to-end to surface inefficiencies, execution bottlenecks, and sources of value leakage. This approach ensured transformation priorities were grounded in real operational outcomes—not technology experimentation.

Insights from this work informed a prioritized AI transformation pipeline aligned directly to the organization’s R&D innovation strategy. Three high-impact use cases were selected as focused entry points, each supported by a clear business case, defined success metrics, and leadership-level accountability—establishing a strong foundation for scalable, enterprise AI adoption.

AI Use Cases

- 1. Intelligent Budget Reconciliation for PMO and Finance
- 2. AI Augmented Artwork and Compliance Workflows for Labeling
- 3. AI Powered Product Requirements Intelligence

2. Design
Intentionally designed AI to augment human judgment, not replace it.

Core workflows were deconstructed end-to-end to identify sources of manual burden, error risk, and compliance exposure.

Working within the organization’s Microsoft-centric technology ecosystem, Syner-G mapped data sources and system dependencies across finance, labeling, and requirements management platforms. AI capabilities—including semantic search, natural language generation, and structured data extraction—were applied to index content, propose requirement language, structure and organize information, source tag inputs, and flag inconsistencies.

The result: designed intelligent assistance embedded into daily workflows when and where the teams need it - targeting higher accuracy, faster authoring, and stronger end-to-end traceability with the digital, human, and policy layers working together.

3. Deliver
Determined optimal implementation pathway

Syner-G partnered closely with the client to evaluate delivery options across internal teams balancing speed, ownership, and long-term scalability. This ensured that each AI use case was matched with the delivery model best positioned to execute efficiently while maintaining continuity and compliance.

For this R&D innovation portfolio, a hybrid delivery model was selected. The model was intentionally flexible. If the client preferred to leverage internal teams, Syner-G collaborated with them to ensure alignment with the 3Di™ design principles. High-maturity use cases with clear internal capability were transitioned to designated client teams to accelerate time to value.

Conclusion

The 3Di™ approach enabled the organization to move from AI experimentation to operational impact, delivering measurable productivity gains, accelerating cycle times, improving user adoption, and building scalable capabilities for future AI-enabled ways of working.

Results At A Glance:

Use Case	Scope of Transformation	Measured Impact
Intelligent Budget Reconciliation for PMO and Finance	Automated budget-to-actual reconciliation using JDE GL exports, PMO budget files, Power Automate, and SharePoint reporting.	• 2.5 to 5 hours saved per financial cycle • Reduced manual reconciliation effort • Improved reporting efficiency and scalability
AI Augmented Artwork and Compliance Workflows for Labeling	AI-enabled document analysis, content generation, and process question support for CRA/LCR workflows.	• Reduced Quality System tracking time from 5-37 hrs / week (volume dependent) • Reduced Operating Procedure lookups by 5-10 hrs / week • Faster access to critical information and reduced manual review effort
AI Powered Product Requirements Intelligence	AI-assisted traceability support using FDA guidance, RTM files, biodesign inputs, and voice-of-customer insights.	• Requirements development accelerated by 2-10 weeks • User adoption increased from 69.7% at initial training to 97.6% • Improved consistency, traceability, and decision-making

Looking to turn AI potential into operational advantage?

Connect with Syner-G to identify where AI can unlock value across your product and portfolio lifecycle and build a roadmap grounded in execution, not experimentation.