

CARL JONES

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MANAGING DIRECTOR | AI & DIGITAL STRATEGY | VALUE CREATION

PROFESSIONAL SUMMARY

Consulting executive with 14+ years of experience advising private equity investors, boards, and C-suite leaders on translating AI and digital technologies into measurable enterprise value. Trusted advisor across the full investment lifecycle, from commercial and technology due diligence through value creation strategy and post-transaction transformation. Proven originator of client relationships and practice revenue, generating \$20M+ in revenue attribution at the Managing Director level while leading engagements spanning Media, EdTech, MarTech, AdTech, FinTech, CPG, Energy, Mining, and Business Services. Recognized for pairing rigorous commercial and financial analysis with deep technology fluency, combining strategy, product, and economics to help investors and operators make confident decisions about AI investments and convert them into durable enterprise value.

AREAS OF EXPERTISE

AI & Digital Strategy • Value Creation Planning • Commercial Due Diligence • Technology Due Diligence • Financial Forecast
• TAM / SAM / SOM Market Sizing • Pricing Strategy • M&A Integration Management • Agentic & Gen AI Product Strategy

SELECTED ACHIEVEMENTS

- **Practice Revenue:** Generated \$20M+ in revenue attribution as Managing Director through direct origination with private equity sponsors, lenders, and portfolio company executives.
- **Enterprise Impact:** Delivered AI value creation plans identifying 30% revenue uplift and 30–45% cost reduction opportunities for a leading global PR and communications platform.
- **Cost Transformation:** Reduced video streaming platform operating costs by 20% for a direct-to-consumer OTT service while enhancing back-end systems to support growth.
- **AI Pipeline Development:** Architected AI initiative portfolios totaling 120+ opportunities for a \$15B energy leader, 90+ opportunities for a global media & EdTech brand, and 50+ opportunities for a \$7B CPG retailer.
- **Cross-Industry Breadth:** Led engagements for clients ranging from \$500M growth-stage platforms to \$20B+ global enterprises, serving both strategic management teams and financial sponsors including Blackstone, BlackRock, OEP, and Platinum Equity.

PROFESSIONAL EXPERIENCE

FTI CONSULTING | New York, NY

October 2015 – Present

Global business advisory firm serving private equity, boards, and executive teams on strategy, transformation, and transactions.

Managing Director, AI & Digital Accelerator Practice

2022 – Present

- Lead advisor to private equity investors, boards, and executive teams on AI strategy (incl. commercial, financial, and technical analysis), translating AI and Digital investments into revenue growth, margin expansion, and competitive positioning.
- Generated \$20M+ in revenue attribution through direct BD with corporates, portfolio company, sponsors, lenders, and operating executives.
- Pioneered new AI strategy offerings at FTI, developing proprietary methodologies for AI-Rapid Diagnostics, AI Cost Transformation, Rapid Prototyping, AI Disruption Analysis, and Agentic Business Case Development.
- Introduced AI-enabled ways of working across the practice: applying AI software development tools to demonstrate art-of-the-possible during opportunity identification, agentic AI models for market and competitor research, and advanced deep research methods to accelerate client delivery.
- Advise investors and CEOs across the full deal lifecycle: commercial and technology diligence, value creation planning, post-close transformation, and exit readiness.
- Represent FTI in executive working sessions with boards and investment committees on AI vision, strategic roadmaps, and 100-day mobilization plans.

Senior Director, Technology, Media & Telecom

2020 – 2022

- Led strategic advisory, due diligence, and digital transformation engagements across media, technology, and consumer platforms; scaled AI and digital strategy offerings within the TMT segment.
- Led program management and cost transformation for a direct-to-consumer OTT streaming service, reducing video streaming platform costs by 20% while modernizing back-end systems to support growth objectives.
- Developed SaaS transformation financial model and value-based pricing framework for a global media technology company; led executive pricing workshops and defined the license-to-subscription migration model.

- Led Integration Management Offices (IMOs) for multiple technology, media, and healthcare transactions, defining integration strategy, governance, and synergy tracking through Day-200.
- Conducted technology, engineering, and commercial due diligence in support of private equity and strategic M&A across online media, eCommerce, streaming, and SaaS targets.
- Provided interim finance support for an AdTech portfolio company, developing P&L and liquidity forecasts, MD&A commentary, and board-level materials for creditors and equity investors.

YIPITDATA | New York, NY

2015 – 2015

Alternative-data technology start-up leveraging proprietary web-scraping and machine learning techniques to forecast the financial performance of publicly traded companies. Hired as the company's first non-engineering employee.

Director of Operations

- Led go-to-market strategy for the company's alternative-data products, sized the asset management opportunity, validated pricing, and prioritized target firms to focus sales efforts; engaged third-party firms to evaluate distribution and channel partnerships.
- Designed end-to-end sales business processes and led CRM selection, implementation, and company-wide transition; streamlined recruiting operations and ran a LinkedIn-driven outreach program to scale the team to hiring plan.
- Completed the company's engineering training program; developed proficiency in full-stack web application development, establishing an engineering-fluent foundation for later AI and digital strategy work.

PRICEWATERHOUSECOOPERS | New York, NY

2012 – 2015

Global professional services firm. Member of the Advisory / Customer Impact Consulting practice, focused on digital strategy, customer experience, and technology-enabled transformation.

Senior Associate, Customer Impact Consulting

2014 – 2015

- **Global Insurance Company:** Served as lead business analyst for MetLife's first mobile app and redesigned mobile site, the first digital platform enabling MetLife customers to view all of their policies in a single experience. Defined business requirements, presented to Marketing and IT executive leadership, and managed a user migration and email campaign that reached 1.3M+ customers and drove 100K+ site visits.
- **Leading Financial Services Company:** Developed 3-year customer experience roadmap for a leading financial services company; led executive interviews, prioritization workshops, and roadmap refresh framework.
- **Global Semiconductor Company:** Designed global Sales business processes for a semiconductor and a technology company post-acquisition; facilitated future-state operating model and system design sessions with VP- and Director-level stakeholders.

Associate / Experienced Associate, Customer Impact Consulting

2012 – 2014

- Delivered digital commerce strategy, CRM strategy assessment, and Salesforce.com / SAP CRM implementation support across financial services, industrial products, and hospitality clients. Previously Customer Strategy & Operations Intern (2011) and Marketing & Sales Intern, Client Driver Group (2010).

REPRESENTATIVE CLIENT ENGAGEMENTS

Selected from engagements delivered across the full deal and transformation lifecycle.

AI Strategy & Value Creation

- **Global Digital Publishing & EdTech Brand (PE-owned):** Lead AI commercial strategy and technology advisor across a multi-phase transformation. Built an inventory of 90+ AI initiatives, defined a transformative AI north-star, designed future-state enterprise AI architecture and operating model, and mobilized the execution workplan, including leadership recruiting, governance, and platform consolidation.
- **\$15B Energy Leader:** Developed AI enablement strategy for commercial operations. Identified 120+ digital and AI opportunities, designed a next-generation digital platform (Data & Analytics, Integrations, and AI Foundation hubs), and built a strategic roadmap and TMO governance structure.
- **\$20B Global Mining Company:** Led digital and AI transformation strategy; developed a digital north-star, identified 70+ AI and digitization use cases across the mining value chain, and facilitated a 3-day cross-functional hackathon that delivered a functioning prototype to reimagine a core corporate process.
- **\$7B CPG Retailer:** Designed Agentic AI-enabled customer engagement strategy. Benchmarked 70+ conversational AI capabilities, identified 50+ high-value AI use cases, and defined a future-state architecture and transformation roadmap to transition from a rules-based chatbot to an intelligent AI-Assist self-service model.
- **Global PR & Communications Platform:** Led AI-enabled growth strategy and value creation plan for a leading global PR and media technology platform. Conducted market sizing across four geographies, competitive benchmarking, and 30+ customer, competitor, and industry expert interviews. Identified ~45 AI opportunities synthesized into 11 prioritized revenue and efficiency initiatives, a 3x TAM expansion opportunity, and potential for ~30% revenue uplift and 30–45% cost reduction.

AI, Commercial, & Technology Due Diligence

- **Agentic BPO Platform:** Led AI and lender due diligence on a BPO company deploying AI agents in debt collection workflows. Assessed Agentic AI architecture, LLM orchestration, RAG systems, and enterprise integrations; benchmarked Target's functional and technical AI capabilities; reviewed term sheet and proposed modifications to mitigate deal risk.
- **Leading IT Managed Services Provider:** Led commercial due diligence and market assessment. Developed top-down/bottom-up TAM, SAM, and SOM; conducted 25+ customer interviews; benchmarked competitive positioning, NPS, and switching costs; identified whitespace and cross-sell opportunities.
- **Media Supply Chain Company:** Led commercial due diligence in support of a private equity acquisition. Forecasted market demand, company revenues, and market share across 18 product lines; built segment-level profit cube benchmarked against the competitive set; identified margin pressure and cloud-adoption risk.
- **Enterprise SaaS MarTech Platform:** Conducted independent lender-side business plan review of an AI-enabled customer engagement platform. Built a multi-year financial model evaluating bookings, renewals, collections, and churn dynamics; developed a DCF valuation model supporting M&A considerations; identified cost optimization opportunities to accelerate AI-enabled transformation.

Digital Transformation & Operating Model

- **Loan Origination and Service Company (Digital Transformation):** Co-led digital transformation with CEO and CIO to enable 3x revenue growth at a constant cost basis. Defined AI-first modular enterprise architecture, redesigned loan origination and servicing workflows, led vendor selection, managed technical integration, and served as trusted advisor to the board and PE sponsor through leadership transitions and a sale process.
- **Media Technology Company (SaaS Transformation):** Designed pricing strategy and SaaS transformation for a global provider of professional video production technology. Led pricing workshops with key executive stakeholders and Built value-based pricing, CLV, and contribution margin models; designed the perpetual-to-subscription migration model that supported executive approval of a 3-year digital transformation budget.
- **Direct-to-Consumer OTT Streaming Service (Digital Cost Transformation):** Provided strategic advisory and program management for a platform cost transformation initiative. Established governance, designed end-to-end functional architecture, and reduced video streaming platform costs by 20% while enhancing platform capabilities.

Financial Advisory & M&A Integration

- **AdTech Company:** Developed enterprise-level P&L and liquidity forecasts, developed operational budget with cost-center owners, tracked savings targets across contract renegotiations and headcount actions, and co-authored MD&A commentary for monthly unaudited financials presented to the board, creditors, and equity investors.
- **Multi-Transaction IMO Leadership:** Led Integration Management Offices across technology, media, and healthcare transactions. Established IMO governance, led integration planning across IT, HR, Operations, Marketing, and Finance, validated and tracked synergy estimates, and managed plan execution through Day-200 with weekly executive and board-level reporting.
- **Healthcare company:** Developed 18-month enterprise strategic roadmap and defined strategic imperatives with C-suite. Managed team of three to build financial and operational reporting across segments and geographies. Facilitated C-suite strategy sessions driving data-driven decisions on M&A, operations, and real estate; developed board materials.

THOUGHT LEADERSHIP

Publications

Selected publications co-authored with FTI Senior Managing Directors Sumeet Gupta and Bruce Benson:

- [*"AI's Impact on Business Transformation: Seven Structural Shifts"*](#) with Sumeet Gupta. FTI Consulting, March 2026.
- [*"AI's Impact on Business Transformation: Five Priorities for Firms"*](#) with Sumeet Gupta. FTI Consulting, March 2026.
- [*"TV360: Prospering Through an Era of Disruptive Change"*](#) with Bruce Benson. FTI Consulting, September 2025.
- [*"Rethinking Business Models With AI"*](#) with Sumeet Gupta. FTI Consulting, January 2025.
- [*"AI in Private Equity: Three Plays for Driving Value Creation in 2025"*](#) with Sumeet Gupta. FTI Consulting, December 2024.

Speaking Engagements

- AI panelist at the **Raymond James Security Investor Conference, Flaster Greenberg M&A Conference, and Mayer Brown The Restructuring Playbook 2026** event. Featured speaker, **Amagi Airtime Webinar:** "Media in the Cloud Era: Balancing ROI, Innovation & Growth."

EDUCATION & ADDITIONAL

Cornell University: Dyson School of Applied Economics & Management (B.S., Applied Economics and Management) Ithaca, NY

Technical Foundation: Completed full-stack engineering training at YipitData; Python and JavaScript self-study enabling direct technical engagement on architecture and AI/ML components.

Interests: Private Pilot with Instrument Rating, personal fitness, applied AI experimentation.