

Know when a new portfolio company needs focused operating help.

The trigger is not that IT is imperfect. It is that the first 100 days, integration plan, or value-creation agenda depends on work the current operating system is not reliably completing.

BRING IN PLAIN OPS WHEN

- **Diligence found an IT or security issue, but not an executable plan.**
The risk is visible. Ownership, sequence, dependencies, or the decision path are still unclear.
- **The 100-day plan depends on IT and urgent work keeps displacing it.**
The team is carrying incidents, security findings, audit requests, and post-close commitments with the same constrained people.
- **Integration, add-on, carve-out, or TSA work is exposing operating gaps.**
Handoffs, systems, access, reporting, or service ownership are not absorbing the transaction cleanly.
- **Management can see the problem but cannot stabilize and change it at the same time.**
The direction may be right. The missing piece is focused execution capacity with a clean handoff.
- **Capital or vendor requests are arriving before the business case is defensible.**
Spend, risk, lifecycle, capacity, and the required business result are not yet connected in one decision.
- **The same operating problem survived a new leader, tool, vendor, or governance layer.**
The visible fix changed. The way work enters, waits, gets decided, and closes did not.

WHAT USUALLY FORCES THE INTERVENTION

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| 1 COMMITMENT
100-day, integration, reporting, risk, or value-creation objective. | 2 PRESSURE
Day-to-day work consumes the same people needed to deliver it. | 3 CONSTRAINT
Ownership, sequencing, handoffs, or capacity do not hold. | 4 RESULT
The plan slips, spend rises, or the explanation keeps changing. |
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POST-CLOSE EXECUTION | INDEPENDENT EVIDENCE

Faster technical work does not automatically deliver the plan.

AI can accelerate technical tasks without accelerating integration, go-live or a portfolio commitment. The difference is how work moves across organizational boundaries.

WHAT SURVEYS FIND IS TYPICAL

INDIVIDUAL SPEED, SYSTEM STABILITY

80%+

DORA (2025): more than 80% report that AI improved their productivity. Greater AI adoption was also associated with higher software delivery throughput and instability. ^[1]

BUSINESS OUTCOME TARGETS

48%

Gartner (2024): 48% of digital initiatives met or exceeded business-outcome targets on average; 71% in its CIO/CxO co-owned delivery cohort. ^[2]

WHAT IMPROVEMENT HAS ACHIEVED

PUBLISHED IT DELIVERY CASE | HEALTHCARE PAYER

35%

shorter delivery cycles

Tegria reports that 90% of requests needed routing to external teams. Value-stream mapping, cross-functional teams and value-based prioritization changed the delivery system. ^[3]

400%

increase in weekly requests fulfilled

9.8%

More production at a stone manufacturer, with no added labor, after Lean mapping and a targeted layout change. NIST MEP (2025). ^[4]

The operating mechanism: Technical speed does not clear decision queues. Work crosses owners and vendors, then waits for approval or returns for rework. Follow the full path from commitment to acceptance.

Operating Partner question: Can the current operating system deliver the IT-dependent commitments in the value-creation plan?

SOURCES 1 Google DORA, AI report (2025) · 2 Gartner, Digital Initiatives (2024)
3 Tegria, Payer IT case · 4 NIST MEP, Polycor case (2025)

What the first intervention should produce

The first job is to establish the real state and make the next calls executable. Not to launch another transformation program.

1 | CONSTRAINT CLARITY

A straight answer about what is actually blocking the business.

Follow the work across teams and vendors, separate symptoms from mechanisms, make unknowns explicit, and show which few constraints are creating most of the delay, instability, or execution risk.

2 | STABILIZATION

Enough operating control to protect the post-close agenda.

Clarify ownership, intake, priority, handoffs, escalation, and closure where they are driving repeat work. Stabilization is useful only when it returns capacity to planned execution.

3 | EXECUTION PATH

A sequenced set of changes the company can actually carry.

The client leaves with the decisions, owners, sequence, evidence expectations, and success measures needed to start. If the diagnosis is already clear but nobody has room to run the first changes, I can provide temporary execution leadership and hand control back.

PRIOR OPERATING RESULTS

DELIVERY TO REVENUE

ARR grew from \$3.4M to \$13.8M within one year while stale signed-contract backlog fell from roughly \$22M to \$8M.

The delivery model was rebuilt around scope, capacity, lifecycle, and stabilization so signed work moved to go-live instead of aging in queue.

CAPITAL DECISION QUALITY

\$8.5M one-year infrastructure buy list became a three-year investment plan with about \$3M lower projected spend.

The plan moved the decision from products and price to requirements, lifecycle risk, resilience, sequencing, and total cost. It earned CFO endorsement and anchored the next two budget cycles.

OPERATING LEVERAGE

IT went from 65 people to 42 while major incidents fell 60%.

Broad incident MTTR fell 79%. The organization was being right-sized to financial reality; the operating model was rebuilt so the smaller team could perform better rather than simply absorb the same work.

TEAM OPERATING HEALTH

30 of 35 comparable team-health questions improved.

Favorable responses rose from 54.7% to 68.3% across anonymous surveys while the respondent base grew from 27 to 53 through rapid hiring, COVID, and an operating-model rebuild.

Have a new portfolio company where IT has become a value-creation question?

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