

AI is speeding up how companies operate. Are you speeding in the right direction?

I. SITUATION Speed without strategy is misallocated attention.

PE firms and their portfolio companies are under pressure to show AI adoption. Without a clear strategy, many are *driving blind* with their AI and technology investments.

The cost is not only wasted spend. It is misallocated attention at the moment the opportunity cost of distraction is highest. Team fatigue compounds. Strategic drift sets in.

II. APPROACH Strategy before speed. Thesis before tools.

01

Clarify Strategy

Rigorous strategic work at the firm or portfolio-company level, grounded in what AI and automation make possible now, not a 2022 deck.

02

Develop Roadmap

Technology, processes, and people, sequenced to execute the strategy. Specific, cost-counted, built for the value-creation window.

03

Implement

We do not hand over a recommendation and walk away. We implement, integrate, and automate the work ourselves.

III. WHERE WE WORK Two altitudes, one orientation.

For PE firms

MANAGING PARTNERS · OPERATING PARTNERS · VALUE CREATION

- Firm-level strategy and thesis development
- Deal sourcing strategy
- Portfolio monitoring architecture
- Firm-level AI enablement
- Value creation planning

For portfolio companies

CEO · CFO · COO · CRO

- Strategy design and clarification
- Commercial strategy
- Technology roadmap development
- AI-enabled workflow design
- Team readiness and training

"Strategic clarity is a pre-condition for successful AI adoption."

TO BEGIN

Engagements begin with a 30-minute scoping conversation.

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sc0red
services