

Single-Portco AI/Data Opportunity Scan Brief

For PE and VC operating advisors evaluating one portfolio-company AI, data, or automation opportunity.

Purpose

This brief helps an operating advisor turn a broad AI conversation into one focused portfolio-company scenario. The goal is not to launch a portfolio-wide program. The goal is to find a credible first implementation path in one company, learn from it, and decide what should repeat.

Best-fit scenarios

Strong scan candidates usually start from a real operating pressure:

- Weekly executive reporting takes too long
- Sales pipeline visibility is disputed
- Customer success handoffs are manual
- Support triage is inconsistent
- Billing, finance, or collections workflows depend on spreadsheets
- Leadership wants AI but does not know where to start
- The company has data but no clear implementation capacity
- A functional leader has a painful workflow that could become a first win

Weak scan candidates:

- "Find AI opportunities across the company"
- "Tell us how to use AI"
- "Build a chatbot"
- "Automate everything"

Start with one pressure, one team, and one decision.

Inputs to collect

Company context

- Company stage
- Team size
- Function under pressure
- Current operating cadence
- Current systems

- Known data stack
- Management team appetite for change
- Any active transformation, ERP, CRM, data, or BI work

Operating pressure

- What work is manual today?
- Which team feels the pain?
- How often does the work happen?
- How many people touch it?
- What decision does it affect?
- What breaks if it is late or wrong?
- What would a visible first win look like?

Data and systems

- CRM
- ERP or finance system
- Product database or analytics
- Support/ticketing system
- Billing/subscription system
- Marketing automation
- Warehouse or BI tool
- Spreadsheets
- Internal tools

Constraints

- Internal technical capacity
- Security or compliance limits
- Data access issues
- Tool ownership
- Budget appetite
- Timeline pressure
- Management team bandwidth

| Opportunity scoring model

Score each candidate opportunity from 1 to 5.

Business leverage

Does this improve a meaningful operating metric, reduce recurring manual effort, improve visibility, or accelerate a decision?

Data readiness

Does the required data exist, and can it be accessed reliably?

Implementation complexity

Can a first version be scoped without a multi-quarter transformation?

Operating ownership

Is there a functional owner who will use and maintain the workflow?

Repeatability

Could the pattern apply to other companies in the portfolio after one successful implementation?

Recommended scan output

A useful scan should produce:

- Current-state workflow summary
- Data and systems map
- Ranked opportunity list
- First implementation recommendation
- Risks, blockers, and dependencies
- Build, defer, or foundation-first recommendation
- Notes on whether the pattern may repeat across other portfolio companies

First implementation patterns

Good first paths are narrow:

- Automated KPI brief
- CRM or pipeline trust repair
- Product usage to customer success signal
- Support triage workflow
- Finance or billing exception workflow
- Data quality monitoring for board metrics
- Lead enrichment or routing workflow

- Account risk summary with human review

Decision rule

Fund the first implementation when:

- The opportunity is tied to a visible operating pressure
- Data exists and is accessible
- The workflow can be owned by one function
- The first version can ship without replacing core systems
- The result would teach the operator something useful for the rest of the portfolio

NEXT STEP

Bring one client scenario to a partner fit call.

20-min call. Bring the client situation, the technical question, and the decision that needs to happen next. Leave with a written go/no-go — no slide deck.

[Book a partner fit call →](#)

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