

501 GROUP

AI Value Creation & 30/60/90 Execution Plan

Sanitized sample report for a PE-backed portfolio company

Prioritized AI Opportunities

Identify which initiatives create value in the next 6–12 months and which should wait.

30/60/90 Execution Plan

Phase-by-phase milestones, deliverables, ownership, and success criteria.

Governance & Value Measurement

Executive ownership model, KPI framework, and illustrative ROI example.

Executive Summary

Assessment Objective: Identify where AI can create measurable business value within the next 12 months, evaluate execution readiness, and define a practical 30/60/90-day plan that leadership can act on immediately.

Dimension	Sanitized Example
Company profile	Industrial / specialty manufacturing or scientific software business
Revenue range	\$25M–\$75M
Ownership	PE-backed or founder-led company preparing for institutional growth
Sponsor question	Where can AI create measurable value, and who should own execution?
Output	Prioritized AI value map, readiness view, governance model, and 30/60/90 execution plan

Portfolio Company Context

- Leadership has broad interest in AI but no clear owner, sequencing model, or decision framework.
- Functional leaders have identified many possible use cases, but execution capacity supports only a small number of initiatives.
- Data exists across multiple systems with inconsistent ownership, quality, and reporting discipline.
- Technology debt and competing priorities make it difficult for the company to move quickly without disrupting core operations.

Key Findings

Finding	Business Impact	Implication
No AI ownership	Duplicate effort, conflicting priorities, slow execution	Assign an executive owner and establish a steering cadence
Data fragmentation	Limits AI reliability and increases manual reporting effort	Prioritize use cases that work with available data while improving data foundations
Opportunity backlog exceeds capacity	Resource dilution and delayed ROI	Limit initial efforts to 3–5 initiatives
Technical debt constrains execution	Teams spend energy maintaining legacy foundations	Separate near-term AI wins from platform modernization work
Unclear success metrics	Pilots risk becoming science projects	Define KPIs before building

Prioritized AI Opportunities

#	Initiative	Expected Outcome	Time to Value	Effort	Value Category
1	Customer service copilot	20–30% reduction in ticket handling time; improved response quality	60–90 days	Medium	Productivity / CX

#	Initiative	Expected Outcome	Time to Value	Effort	Value Category
2	Sales and proposal automation	Faster proposal creation; reduced administrative effort	30–60 days	Low	Revenue acceleration
3	Management reporting automation	Less manual reporting; faster leadership visibility	30–45 days	Low	Decision speed
4	Knowledge base retrieval	Improved employee access to policies, technical docs, procedures	60–90 days	Medium	Productivity
5	Data quality foundation	Improved governance and reliability for future AI initiatives	90+ days	High	Execution readiness

30/60/90 Execution Plan

Phase	Objectives	Core Deliverables	Success Criteria
First 30 days	Confirm priorities, assign ownership, validate readiness. Establish focus — not launch.	Executive steering committee; opportunity prioritization matrix; data readiness review; KPI definitions for top 3 initiatives	Top 3 initiatives approved; executive owner named; baseline metrics agreed; no new initiatives added without explicit prioritization
Days 31–60	Validate the value hypothesis before committing further resources. Build pilots, test assumptions, measure early signal.	Pilot design documents; lightweight solution builds; user testing results; adoption plan; ROI baseline established	Working pilot for at least 2 initiatives; initial adoption feedback gathered; value hypothesis validated or explicitly rejected
Days 61–90	Operationalize winners. Establish governance and cadence to sustain execution beyond the initial engagement.	Production deployment plan; KPI dashboard; AI operating model with ownership and escalation paths; next 90-day roadmap	Measurable impact on at least one initiative; clear executive ownership; governance model in place; board-ready update prepared

Execution Risks and Mitigants

Severity	Risk	Mitigant
High	Executive ownership unclear or contested	Establish single accountable owner and steering cadence in first 30 days. Absence of ownership is a blocker, not a nuance.
High	Pilots launched without baseline metrics	Require baseline measurement before any build begins. No metric, no pilot.
Medium	Data quality insufficient for priority use cases	Validate data readiness in first 30 days and substitute lower-dependency initiatives if needed.
Medium	Too many initiatives launched simultaneously	Hard limit of 3 active initiatives during the first 90 days. Additional requests go to the backlog.

Severity	Risk	Mitigant
Medium	Organizational resistance to adoption	Assign a functional adoption owner per initiative. User involvement from day one, not day sixty.
Low	Technology vendor or platform selection delays	Prioritize initiatives that work with existing systems in the first 90 days. New platform decisions are a second-wave problem.

Governance & Ownership Model

Role	Responsibility
CEO / Sponsor	Own business priority, remove cross-functional barriers, chair steering cadence
Executive AI Owner	Maintain opportunity portfolio, sequencing, and accountability across initiatives
Technology Lead	Assess architecture, integration, data readiness, and security constraints
Functional Owner	Define business workflow, adoption plan, and operational KPIs per initiative
HR / People Lead	Manage workforce communication, change readiness, and adoption friction
Finance Partner	Validate value measurement, ROI assumptions, and baseline metrics

Value Measurement

Metric Category	Example KPI	Measurement Method	Cadence
Productivity	Hours saved per week; cycle time reduction	Baseline workflow timing vs. post-pilot measurement	Monthly
Revenue enablement	Proposal turnaround; sales cycle support time	CRM and sales operations reporting	Monthly
Cost / margin	Manual effort reduction; support volume per FTE	Finance and operations baseline	Monthly
Adoption	Active users; process compliance rate	Usage telemetry and manager review	Bi-weekly
Risk	Error reduction; governance adherence	Quality checks and audit review	Monthly

Illustrative ROI Example

The following example shows how value measurement works in practice for a single initiative. Numbers are conservative and illustrative. Actual baselines and outcomes are established during the first 30 days of an engagement.

Initiative: Management Reporting Automation

Scenario: Finance and operations team spends significant time each week pulling data from multiple systems and assembling manual reports for leadership. AI-assisted automation consolidates sources and generates draft reports on a scheduled basis.

Metric	Baseline	Post-Implementation	Value Created
Weekly manual reporting hours	12 hrs / week across 3 FTEs	3 hrs / week	9 hrs saved / week
Annualized labor savings	\$85K loaded cost per FTE	—	~\$20K–\$25K / year
Leadership reporting lag	5–7 business days	Same day / next morning	Faster decisions on margin and ops issues
Implementation complexity	—	Low — existing systems, no new infra	Payback typically within 60 days
Measurement method	Time-tracked baseline, 2 weeks	Same cadence post-deployment	Finance-validated; monthly to steering committee

Note: Labor savings are a floor, not a ceiling. The higher-order value is leadership visibility — faster access to operating data reduces the cost of slow decisions, which is rarely captured in an hours-saved calculation but is typically more significant at the board level.

Executive Recommendations

- Limit initial AI efforts to initiatives with clear business owners and measurable outcomes. Three active initiatives is a discipline, not a limitation.
- Prioritize business value and execution readiness over experimentation volume.
- Assign one executive owner for the AI opportunity portfolio before any build begins.
- Separate quick-win automation from longer-term data and platform modernization work — do not let them compete for the same resources.
- Review progress monthly at the executive team or board level until operating cadence is established.
- Treat AI as an operating discipline, not a standalone technology program.

Expected Outcomes

Outcome	Expected Timing	Sponsor Relevance
AI value opportunities prioritized and owned	First 30 days	Improves leadership focus and capital allocation decisions
Pilot impact measured against baseline	Days 31–60	Validates ROI assumptions before scaling investment
Operating plan approved and in execution	Days 61–90	Creates an executable value-creation roadmap for the next board update
Governance model established	Days 61–90	Reduces execution risk and ensures continuity beyond the engagement

About 501 Group

501 Group is an operator-led AI and technology advisory practice focused on PE-backed and founder-led companies. Founded by Christopher Butters, a senior technology executive with two decades of experience scaling AI, data, cloud, and engineering organizations, the practice is built around a simple premise: most companies don't need more AI strategy — they need someone who

can tell leadership which initiatives are worth pursuing and how to actually deliver them.

Engagements are practical, time-bounded, and designed to produce decisions and execution plans — not strategy decks. Every engagement is operator-led, not staffed to a junior consulting team.

Engagement Type	Description
AI Value Assessment	Discovery, stakeholder interviews, prioritization workshop, and 30/60/90 execution plan. Typical duration: 3–4 weeks.
Pre-Investment Diligence	Technical architecture, AI readiness, data maturity, and delivery capability assessment ahead of investment decisions.
Fractional / Interim CTO	Ongoing senior technology leadership for portfolio companies without a CTO or requiring executive-level technical judgment.
Operating Partner Support	Technical advisor to the PE firm for portfolio-wide AI strategy, diligence support, and board-level technology briefings.

E&O; Coverage In Place	NDA Available on Request	US-Based Operator	Board-Level Experience
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Ready to discuss your portfolio?

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Sanitized sample for PE portfolio value-creation discussions · Confidential