Portfolio Operating Intelligence

Allocating AI investment across a multi-company portfolio

A working product exploration for comparing AI opportunities, pressure-testing implementation assumptions, and identifying reusable capabilities worth scaling across portfolio companies.

EXECUTIVE SUMMARY

Operating teams face a recurring allocation problem: where should the next unit of attention, capital, and implementation capacity go? A promising AI use case is only a starting point. The decision also depends on company context, data readiness, accountable ownership, implementation cost, adoption risk, and the evidence available to support the economics. Portfolio Operating Intelligence is a working product exploration of how a shared decision layer can make that diligence more consistent without flattening the differences between companies.

MODELED SCOPE

11	33	8
COMPANIES	INITIATIVES	PLAYBOOKS

Figures describe modeled scope, not realized outcomes.

KEY TAKEAWAYS

1 Standardize the review - not the answer.

Common criteria create comparability; company context and source evidence determine the decision.

2 Reuse capabilities - not implementations.

Shared playbooks and vendor patterns reduce repeated discovery while execution ownership stays local.

3 Use AI to challenge the thesis - not approve it.

The advisor surfaces assumptions, risks, and unanswered questions for human review.

DECISION FRAMEWORK

A common operating discipline structures the review; evidence, not the score, determines whether to proceed.

01 PRIORITIZE
Where should we investigate?
Context • value • effort

02 VALIDATE
What must be true?
Baseline • owner • cost

03 SCALE / STOP
What does the evidence support?
Pilot • readiness • reuse

PRODUCT SNAPSHOT

MERIDIAN / PORTFOLIO OPERATING INTELLIGENCE — AI ADVISOR

Portfolio
Initiatives
Companies
Playbooks
Digests

Portfolio priorities

Compare readiness, value and execution risk across the portfolio.

11 Companies	33 Initiatives	8 Playbooks

INITIATIVE	STAGE	RICE
Contract intelligence	Validate	92
Customer service copilots	Pilot	86
Finance close automation	Discover	78

WHAT THE PRODUCT MAKES VISIBLE

- Portfolio priorities ranked in a consistent review model.
- Company context behind a score or stage.
- Implementation plans and 30/60/90-day assumptions.
- Shared vendors and playbooks that may be reusable.
- Context-aware AI questions at portfolio, company, initiative, or playbook level.

INTERPRETATION

The ranking starts the conversation. The underlying evidence should determine the investment decision.

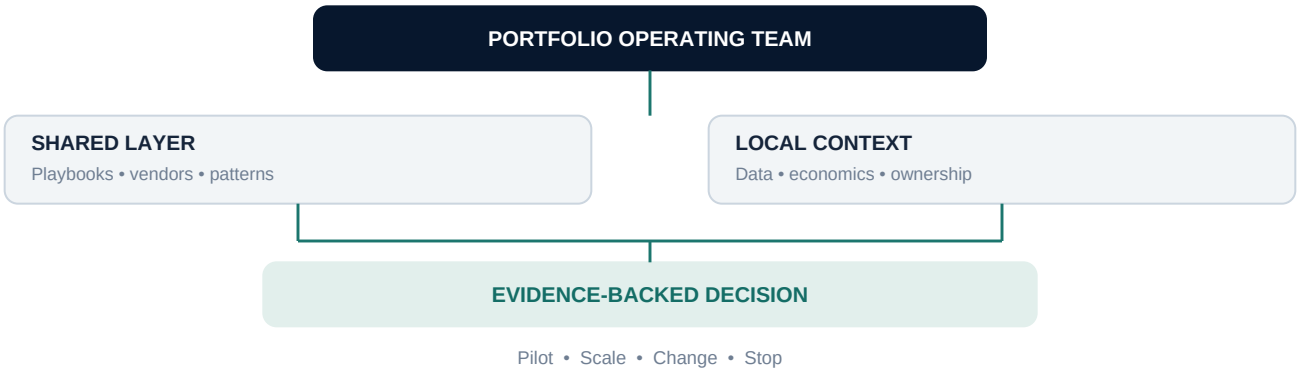
Source: Pat Mullee, Portfolio Operating Intelligence demonstration. Fictional portfolio; scores and figures are illustrative, not measured client results.

Design choices and validation plan

The prototype is intentionally opinionated about where standardization helps, where local context must remain visible, and how AI should participate in an investment workflow.

OPERATING MODEL

Central coordination should reduce repeated discovery without forcing every company into the same implementation.



THREE PRODUCT DESIGN DECISIONS

01

STANDARDIZE THE DECISION, NOT THE COMPANY

The portfolio view uses a common lifecycle and priority structure so opportunities can be compared. Opening an initiative adds the value lever, impact and effort, vendor approach, implementation process, and 30/60/90-day plan. A uniform score cannot resolve differences in data readiness, management capacity, customer risk, or implementation cost.

02

SEPARATE REUSABLE CAPABILITIES FROM LOCAL EXECUTION

Shared vendor views and cross-company playbooks make reuse visible. A common playbook can establish an approach and validation criteria, but each company remains responsible for integration, change management, and operating results. Reuse should depend on compatible workflows, data, and controls.

03

MAKE AI AN ADVISOR, NOT AN APPROVER

The advisor uses portfolio, company, initiative, or playbook context to frame risks, dependencies, and next questions. Generated responses require review against source evidence; the model does not verify vendor claims, approve funding, or establish that a proposed return will materialize.

AI'S ROLE IN THE SYSTEM

The model is most useful when it narrows ambiguity rather than replacing judgment.

EVIDENCE
Inputs and source material

↓

AI ADVISOR
Frames assumptions and next questions

↓

QUESTIONS / RISKS
Surfaces gaps and dependencies

↓

HUMAN DECISION
Owns funding and scale / stop

Decision ownership stays human; the advisor is there to improve the questions, not to authorize the outcome.

HOW I WOULD VALIDATE BUSINESS VALUE

Start with a small set of initiatives and measure whether the shared view changes decisions and follow-through before treating usage as proof of value.

DIMENSION	BASELINE	PILOT EVIDENCE	DECISION RULE
Review effort	Time spent preparing reviews	Prep time and repeated work avoided	Scale only if decision quality is maintained or improved
Decision speed	Time from proposal to decision	Cycle-time change and unresolved blockers	Revise if faster decisions come from missing diligence
Adoption	Expected users and workflow owner	Observed use in the real operating process	Stop if the workflow is not sustained by accountable owners
Economics	Implementation + run cost assumptions	Cash savings, contribution, or released capacity	Separate financial value from capacity that has no credible reuse plan
Execution	30/60/90-day milestones	Quality, delivery cost, implementation follow-through	Scale when evidence supports economics and operating readiness

PROTOTYPE SCOPE AND PRODUCTION REQUIREMENTS

IMPLEMENTED IN THE DEMO

React • fictional portfolio data • lifecycle views • 11 companies • 33 initiatives • 8 playbooks • contextual AI via AWS Lambda + API Gateway.

PRODUCTION WOULD ADD

Durable records • RBAC • evidence provenance • audit logs • workflow integrations • model-quality monitoring • explicit approval ownership.

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