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Fractional AI Operating Partner for PE-backed companies

AI past the pilot and into the P&L, inside the hold period. Operator by trade, builder by hand, measured in the CFO's number.

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THE SEAT

- Owns the AI line of the value-creation plan: one function, one owner, one number, one system.
- Ships the working system into the system of record, personally. No analyst bench, no handoff.
- Designs adoption on the workforce side: owner, incentives, training, compliance.
- Reports monthly to the board in basis points of EBITDA. Packages every rollout as a playbook.

WHO IT IS FOR

- Lower-middle-market PE funds with fewer than about fifteen portfolio companies that cannot justify a $400K to $700K full-time AI operating partner.
- Portfolio companies of $20M to $500M revenue with a board-level AI mandate and no number yet.
- Founder-led and mid-market companies in the same position.

THE ENGAGEMENT LADDER

RUNG	WHAT IT IS	DURATION	PRICE
AI Pilot-to-P&L Scorecard	Six failure modes scored 0 to 3; which one to fix first	3 minutes	Free
Portco AI Diagnostic	Workflow and adoption map, EBITDA-impact model, don't-automate list, named owner, 100-day plan, board one-pager	2 weeks, one portco	$7,500, credited
Portfolio AI Screen	The diagnostic across up to five portcos with a fund-level ranking	4 weeks	$25,000
100-Day Pilot-to-P&L Sprint	One function to the standard: shipped system, trained operators, weekly usage, board number, playbook	100 days	From $45,000
Fractional AI Operating Partner	Standing seat across functions and portcos; monthly board reporting; playbook reuse	About two days a week, 6-month minimum	$19,650 per month
Portfolio Playbook · Exit Evidence Pack	Per-portco rollout at a declining fee; adoption, ownership and EBITDA attribution documented for buyer diligence	Per rollout · 3 to 4 weeks	Quoted

SHIPPED AND ADOPTED

DueDrill, PE/VC fund due diligence: 40 to 60 analyst hours per deal to under 4; deal-evaluation capacity tripled without added headcount.

AI HR Pilot, venture studio HR operations: ticket resolution from 3 days to under 2 hours; ROI positive within 30 days; became a commercial product.

i9Drill, portfolio-wide compliance: a standing audit-ready I-9 posture across every operating company.

Ravenbridge Capital: two institutional fund sites at $5,000 each against agency quotes of $40,000 to $45,000 per site, in three days.

METHOD: DIAGNOSE · OWN · SHIP · MEASURE · REPEAT

- Map workflows, blockers and loaded labor cost; write the don't-automate list.
- Name one adoption owner; put the number in their incentives; baseline it first.
- Build into the system of record with real data; train three to five operators; the portco owns the code.
- Publish weekly usage; report monthly in basis points of EBITDA.
- Package the playbook so the next function and the next portco cost less.

THE PILOT-TO-P&L STANDARD

Ten pass-or-fail criteria a portfolio company meets when AI has become a number in the P&L: a VCP line with a number; a named adoption owner; a baseline in loaded labor cost; the system of record; real data with a maintainer; weekly usage published; three to five trained operators; company-owned IP; a monthly board number in bps of EBITDA; a packaged playbook. Full guide at portlev.com/pilot-to-p-and-l-standard.

WHO HOLDS THE SEAT

Yuri Kruman, founder. 3x Chief Human Resources Officer across Fortune 500, VC-backed and global organisations. JD, Cardozo Law; BA, University of Pennsylvania. Contract AI model trainer for OpenAI, Meta and Microsoft in the HR and leadership domains. AI curriculum designer for Coursera enterprise programs. #6 Global HR Thought Leader, Thinkers360 (2025 and 2026).

WHY THE MANDATE STALLS, AND THE SOURCES

36% of PE-backed portfolio companies use AI in day-to-day operations; 7% call it fully integrated (FTI Consulting, 2026 PE AI Radar). 9% of operating partners have seen an AI premium in a completed exit (Accordion, 2026). 68% of PE-backed CFOs told to prioritise AI do not know where to begin (Accordion, 2025). More than 80% of AI programs fail on use-case alignment, adoption and unclear success measures (AlixPartners). Average hold period 6.6 years (McKinsey, 2026).