
AN EXECUTIVE WORKING SESSION · BY INVITATION

From Investment Thesis to Verified Value

For European Private Equity Operating Partners and Portfolio Leaders

An operator-led approach that connects the investment thesis to accountable execution and measurable EBITDA, cash and working-capital outcomes.

Across European private equity, value creation has become harder to source and harder to prove. Slower underlying growth, a persistent productivity gap, margin pressure and stretched management bandwidth mean that returns increasingly depend on operational improvement rather than multiple expansion. Sponsors are pushing AI and data initiatives across their portfolios — but the value is not stalling at adoption. It is stalling between the mandate and the result.

European portfolio companies carry an added layer of difficulty: operations spread across borders, fragmented systems and ERP environments, and AI adoption that must be governed against a stricter and still-evolving regulatory backdrop. Leadership teams may have dashboards, consultants, transformation programmes and AI initiatives, while still struggling to answer the questions that matter:

- Where is company value beginning to weaken?
- Which financial, operational and commercial signals are connected — and where do cross-border operations obscure them?
- Which intervention should be prioritised?
- Who owns the decision and its execution?
- Did the action create recurring, cash-backed value?
- Will the evidence withstand board, lender, buyer and quality-of-earnings scrutiny?

THE EVIDENCE IS INDEPENDENT AND CONSISTENT

The value gap is real — and it is not a technology problem.

The most credible research houses now measure the same gap. McKinsey's State of AI 2025 finds that 88% of organisations use AI in at least one function, yet only 39% report enterprise-level EBIT impact and roughly 6% qualify as AI high performers. BCG's Widening AI Value Gap 2025 reaches the same conclusion from a separate sample: only 5% of companies are "future-built" and consistently generating substantial value, while 60% report minimal gains despite meaningful investment.

The defensible conclusion across both: only around one in twenty organisations currently converts AI into material and consistent enterprise-level financial value.

This is not a model problem. High performers and laggards use the same technology; the difference is organisational. Value appears where AI and data are connected to decision rights, workflow redesign, KPI ownership, execution responsibility and rigorous expected-versus-actual measurement.

That is precisely the chain this working session demonstrates — and precisely what the ValueFabric method is built to operationalise.

THE MARKET DOES NOT NEED ANOTHER FRAMEWORK

The challenge is not access to more AI, tools or reporting. It is connecting the complete value-creation chain:

Investment Thesis → Business Signals → Operating Intelligence → Decisions Architecture → Execution Support → Performance Outcomes

ValueFabric, in cooperation with Tier 1 Operating Partners, connects two capabilities that usually sit apart. The organisational conditions required for execution — thesis translation, governance, decision rights, management alignment, accountability and operating cadence — delivered through an experienced operator network. And the intelligence, decision and evidence architecture that connects company context and Business Signals to Operating Intelligence, Decisions Architecture, Execution Support and measurable Performance Outcomes.

Together, this moves investors and portfolio leadership teams from value-creation intent to accountable execution and defensible results.

BUILT FOR EUROPEAN PORTFOLIO REALITIES

The methodology is identical across regions. The European edition applies it with additional emphasis on the pressures that define value creation in this market: productivity and margin resilience, working-capital discipline, cross-border operations, fragmented systems and ERP environments, management capacity, and governed AI adoption.

It also recognises that Europe is one commercial region but not one uniform regulatory or operating environment. Where relevant, the session distinguishes between the EU/EEA, the UK and Ireland, and Switzerland — reflecting different data-protection regimes and different approaches to AI governance. These distinctions are treated as part of the operating reality that value creation must account for; they are illustrative, not legal advice.

WHAT STANDS BEHIND THE METHOD

ValueFabric does not ask investors to take value creation on faith. The approach is built with real-world experts and designed to be verified, not asserted:

- **A network of more than 40 Tier 1 executives and operators**, drawn from investment firms and portfolio companies — experienced practitioners, not a black-box model.
- **A large multi-sector research base** — more than ten years of real-world company research, enriched continuously.
- **A method built on verification** — every outcome traced from baseline through decision, intervention and execution to attributed EBITDA, cash and working-capital impact.
- **Academic validation** supporting the underlying intelligence design.

The methodology and operator-led process are available today. The governed intelligence engine designed to run this continuously and at scale is in active development — and the verified history it builds, connecting context, Business Signals, decisions, execution and outcomes, cannot be licensed or bought. It can only be built, with founding investors and portfolio companies shaping it from the start.

WHAT WE WILL WORK THROUGH

Using a realistic PE-backed portfolio-company case, participants will examine how seemingly manageable movements in gross margin, inventory, forecast accuracy, pipeline quality and receivables can combine into a more serious EBITDA, cash and exit risk. The working session will demonstrate how to:

- detect emerging performance risk earlier;
- connect financial, operational, commercial and cash signals;
- distinguish isolated KPI movements from a developing business trajectory;
- prioritise interventions by impact, urgency and execution feasibility;
- establish clear decision rights, ownership and operating cadence;
- connect actions to expected EBITDA, cash and working-capital outcomes;
- compare expected and actual Performance Outcomes;
- build stronger evidence for boards, lenders, refinancing, diligence and exit.

THE PRACTICAL DISTINCTION

A completed initiative is not automatically value creation.

A KPI movement is not yet verified value.

Value must be connected to a clear baseline, an owned decision, an executed intervention and measurable Performance Outcomes — with sufficient evidence to understand what changed, why it changed and whether the improvement is sustainable.

The session demonstrates the ValueFabric methodology and operator-led analytical process available today. The governed intelligence engine designed to perform these activities continuously and at scale is in active development.

WHO SHOULD ATTEND

- Private Equity Operating Partners
- Portfolio Operations and Value Creation Leaders
- Portfolio CEOs, CFOs and COOs
- Investment Professionals
- Board Members and Operating Advisors
- Interim and Fractional Executives

WHAT PARTICIPANTS WILL LEAVE WITH

A practical understanding of how to connect:

- the investment thesis to the Business Signals requiring management attention;
- Business Signals to Operating Intelligence;
- Operating Intelligence to Decisions Architecture;
- decisions to accountable Execution Support;
- execution to measurable Performance Outcomes;
- verified Performance Outcomes to stronger EBITDA, cash and exit evidence.

This is not another general AI webinar. It is a practical Executive Working Session on how European private equity firms and portfolio companies can create, measure and prove value more consistently.

EVENT DETAILS

Format Live online Executive Working Session

Duration 90 minutes

Scheduling By arrangement (CET / European time zone)

Participation By invitation

Hosted by ValueFabric, in cooperation with Tier 1 Operating Partners

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Following the session, selected participants may nominate one portfolio company for a private discussion on value-creation priorities, execution risk and outcome evidence.