



# AI Roundtable

*The Art of the Possible*

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## Mid-Market PE Firms & Portfolio Companies

Demystifying AI & Unlocking Practical Opportunities

### Overview

Artificial Intelligence (AI) is no longer just for tech giants—it's transforming businesses of all sizes, including mid-market companies. Yet, the AI landscape can feel overwhelming, filled with hype, uncertainty, and evolving capabilities.

This **AI Roundtable** is designed to **cut through the noise** and provide private equity (PE) firms and their portfolio companies with a **practical, business-first approach** to AI. Attendees will gain clarity on what AI can (and can't) do today, explore real-world use cases, and walk away with an actionable roadmap for identifying **high-impact, low-risk AI projects** that will unlock immediate business value.

By incorporating these recommendations, businesses can convert AI anxiety into an AI roadmap, leveraging its potential to fuel growth. AI is a powerful tool, but it's a tool nonetheless. Human expertise remains crucial in problem definition, strategic vision, and ethical considerations. By focusing on business problems and adopting a measured approach, businesses can begin their journey up the AI maturity curve as an organization, decoupling growth from headcount.

### Why This Roundtable Matters

AI adoption isn't about replacing jobs—it's about enhancing productivity and driving better business decisions. Mid-market companies that embrace AI early will gain a competitive edge, while those who wait risk falling behind.

### This Session Will Give You:

- A clear understanding of AI's impact on mid-market businesses
- A framework for identifying AI opportunities in your company
- A collaborative discussion with peers facing similar challenges



### *Interested in attending?*

Let's demystify AI together and help your portfolio companies take their first high-impact AI steps.

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## Real-World AI Use Cases We'll Cover

- **AI-Driven Market & Business Intelligence** – Agents that assist with deal sourcing
- **AI for Finance** – Automating inbound AP
- **AI in Operations** – Agents that match complex requirements with the best HR
- **Sales & Customer** – Personalizing interactions and automating sales processes
- **Workflow Automation** – Reducing repetitive, high-cost manual tasks

**Example:** A mid-market manufacturing company eliminated 2,000 hours of manual purchase order entry using an AI-powered agent, reducing errors and unlocking growth without hiring additional staff.

## Agenda

Section	Time	Format
Where Do We Start: Demystifying AI for Mid-Market	10 min	Presentation
The Art of the Possible: AI Use Cases	5 min	Presentation
AI in Action: Inspiration Through Demos	15 min	Live Demonstrations
Project Identification: Keep it Simple	20 min	Workshop-Discussion

## Key Takeaways

- **Understand AI in Plain Terms** – No buzzwords, just real-world applications
- **See AI in Action** – Hands-on demos of AI-driven automation and decision-making
- **Explore Use Cases** – How AI is already optimizing finance, operations, sales, and customer experience
- **Find Your Starting Point** – How to identify and prioritize AI projects for quick wins
- **AI Strategy for Portfolio Companies** – Scaling AI adoption across a PE-backed ecosystem

## Who Should Attend?

- PE Operating Partners looking to drive AI adoption across their portfolio
- CEOs & CFOs of Mid-Market Companies seeking efficiency and revenue growth
- CTOs & Heads of Digital Transformation exploring AI implementation
- AI-Curious Leaders unsure where to start but eager to learn

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Your Own AI Roundtable**

[info@reeaglobal.com](mailto:info@reeaglobal.com)

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