

Beyond the Hype: What AI Value Creation Really Looks Like in PE

By *Meredith Flynn-Ripley, SVP & GM, Global Head of Private Equity & Venture Capital Practice, Salesforce*

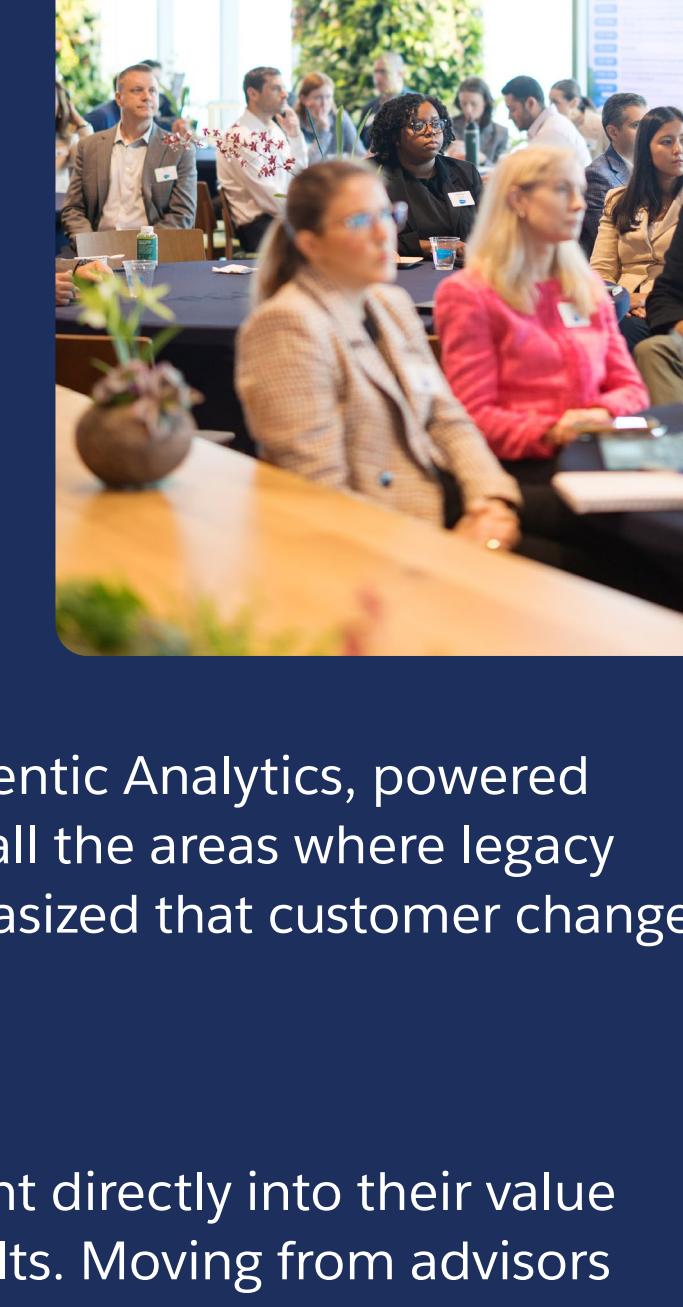
At our recent Private Equity Value Creation Day in New York, one message came through loud and clear: the era of waiting and watching is over. For private equity firms, AI is no longer a futuristic concept or side project for their portfolio companies. It is a core lever for value creation, and it is driving measurable impact across portfolios.

We brought together operating partners, technology thought leaders, and portfolio company executives to cut through the noise, have a conversation and get specific. This was not about high-level strategy. It was about what is working right now, in the field, across real companies...and how to get started.

Here is where the shift is happening:

AI is becoming a lever, not just a layer.

Across our conversations, one theme kept coming up: portfolio companies are putting AI right into the flow of work. It's not just helping cut costs in the contact center but also qualifying more leads, selling 24/7, and driving real business results. One PE-backed company quietly boosted EBITDA by 25% in just four months by combining service cost savings with faster sales. This isn't hype. It's automation that improves margins, and does it quickly.



Revenue is being redefined as a connected system.

In her session "Lead to Cash Reinvented," Meredith Schmidt, EVP and GM of Revenue Cloud, walked attendees through what a unified revenue strategy should look like. How Salesforce Revenue Cloud connects catalog, CPQ, contracts, orders, assets, and billing on a single platform. That kind of integration helps Sales, Finance, and Operations work from the same source of truth and scale faster without friction.

She shared customer stories around using Revenue Cloud Agentic Analytics, powered by Tableau Next, to drive pricing and subscription insights in all the areas where legacy CPQ tools have traditionally fallen short. Meredith also emphasized that customer change management is not just important, it is the key to success.

Execution is what separates winners from watchers.

Several leading firms shared how they are embedding AI talent directly into their value creation teams and building internal capabilities to drive results. Moving from advisors to doers, they are actively engineering AI value creation plans and accelerating impact across their portfolios. Portfolio executives also offered a ground-level view of what real outcomes look like, from meaningful EBITDA gains to scalable, always-on support models.

The common thread: **execution over perfection**. Many of the most successful efforts didn't begin with a fully developed ROI and business case. They started with a single, high-impact problem to solve and scaled from there. For firms still waiting on a traditional ROI business case before taking action, now is the time to rethink that approach. The firms that move decisively today have a first mover advantage and are shaping what value creation will look like for the next decade.

A sincere thanks again to all of the panelists who contributed their time, expertise, and perspective: Pablo Prieto (McKinsey), Chris Gilmore (Salesforce), Bruce Chesebrough (New Mountain Capital), Chris Perotti (Sixth Street), Kanan Garg (Salesforce), Jeroen van den Bergh (UFL), Daymon Boswell (AudienceView), Doug Saunders (Arctic Glacier), and Meredith Schmidt (Salesforce). Their insights sparked thoughtful discussion and offered practical takeaways on how private equity is accelerating impact through AI, data, and digital value creation.

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