

Your AI thesis is priced in. The **execution capacity** behind it is not.

Deals now price AI-driven margins. Almost no one measures whether the operating model can actually deliver them. **Execution risk surfaces after close**, when performance does not replicate and the new owner cannot run the work. The AI strategy may be sound. Whether the value transfers is the open question.

THE GAP NOBODY IS QUANTIFYING

74% of AI's economic value is captured by just 20% of companies. AI value is concentrating fast. The dividing line is not adoption. It is whether adoption becomes value that holds through a change in leadership or ownership.

Source: PwC 2026 AI Performance Study, 1,217 senior executives across 25 sectors.

AI IS REAL. TRANSFERABILITY IS THE VARIABLE.

You are modeling margin expansion. The question a buyer asks is whether that value moves to them, or stays locked in the people who built it.

Value concentrated in a few people gets discounted. Leadership that cannot carry the plan, workflows a buyer cannot follow, and AI adoption that was never governed all show up as valuation pressure.

Key-person dependency, knowledge lineage, workflow ownership, and AI workflow continuity are all measurable. Most companies never measure them.

AI readiness without leadership readiness is not readiness.

GrowFast Advisory

We prove whether enterprise value can transfer, on the unrecorded side of the diligence line, where QoE, commercial, and legal diligence do not reach.

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Two systems. One question: does the value **transfer**, and does it **hold**?

A diagnostic read of whether your operating model can survive a transition, and whether AI adoption has turned into value the buyer keeps.

VGS *Can the value transfer?*

Valuation-Grade Succession measures transferability instead of guessing at it, using three non-subjective reads: **Human Value Concentration**, the **Absence Test** against real performance, and **Constraint-Removal Mapping**. It shows where value sits in specific people and whether knowledge has a lineage or a single point of failure.

Day 2 *Will the value hold?*

Day 2 protects execution durability through the handoff. It stabilizes operating rhythm so performance does not slip after ownership or leadership changes, and it keeps AI workflows running through the people accountable for them.

Proof, not opinion. Transferability, not personality dependency.

WHY STEPHEN MURRAY



Stephen's grandfather, Emile Legros, was an owner and turnaround leader who acquired Cedar Point and grew it by investing in his people.

Our success came from our people. Courtesy is contagious.

Twenty-five years as a Fortune 150 HR executive across **International Paper**, **Pepsi Bottling Group**, **Coca-Cola Enterprises**, **KONE Americas**, and **Ocado Group** proved the same thing at scale: companies that treat people as a strategic asset protect value through transition, and companies that treat them as a cost center pay for it in eroded multiples.

Middle-market exits lack what Fortune 150 deals have, someone connecting operating and workforce decisions to enterprise value. That is the missing seat at the table.

CREDENTIALS

CEPA, Certified Exit Planning Advisor. **Certified Value Builder**. 25+ years Fortune 150 HR executive in M&A, operating transformation, and value transfer.

ILLUSTRATIVE SCENARIOS

A distributor redeploys people into higher-value roles as AI absorbs routine work, protecting revenue continuity. A founder-led manufacturer reduces dependency on the owner, so a buyer inherits a system rather than a person.

Illustrative, for explanation only.



One conversation about value transfer risk

A 60-minute session for PE firms and M&A advisors. We surface key-person dependency, execution gaps, and AI adoption that has not become value, before a buyer finds them.