

Reinventors

A CFO-approvable way to fund AI-enabled revenue.

Everyone can cut cost with AI. Almost nobody makes new money from it. New revenue dies in the business case because it is valued like an efficiency saving. Efficiency is a decision. Reinvention is a portfolio of staged bets.

01 · WHERE THE NEW REVENUE IS

Productised expertise

A service that was uneconomic one customer at a time, delivered at scale. The senior human becomes the exception, not the unit cost.

New product surface

A capability that could not exist before the model, sold as a feature or product a customer will pay for on its own.

New pricing model

Usage or outcome-based pricing AI makes measurable and defensible, capturing value a seat licence left on the table.

New reachable segment

A market too small or costly to serve until the cost of serving it collapsed. The long tail, smaller accounts, a new geography.

02 · THE SIX-AXIS LENS · FIND THE ASSUMPTION MOST LIKELY TO KILL IT

Pull. Evidence customers want it, or are we assuming?

Capability. Can we actually build and deliver it?

Adjacency. Near the core, or far and higher-risk?

Speed to signal. Weeks to a real yes or no, or quarters?

Defensibility. Or can a rival copy it by buying the same AI?

Downside, bounded. Have we defined what we will not risk?

03 · THE FUNDING LADDER · BUY LEARNING, NOT FAITH

STAGE 0

Frame

Write the bet in one line. Name the riskiest assumption. Set the kill criterion now.

COST
Hours.

STAGE 1

Probe

Cheapest test of the riskiest assumption, usually demand. Time-boxed, micro-budget.

GATE
Genuine pull.
KILL
No pull, stop.

STAGE 2

Pilot

Real customers, real small revenue, real delivery.

GATE
Repeatable, economics hold.
KILL
Won't repeat.

STAGE 3

Scale

Fund growth only once economics hold and it is defensible.

GATE
Durable margin + a moat.
KILL
Margin erodes.

Three governance choices make it work. Ring-fence a reinvention budget off the efficiency ROI bar. Run it as a portfolio and expect most probes to die, because a portfolio where nothing dies is not taking real bets. Give it one named owner and a quarterly advance-or-kill review at the gates.

Score a live play at ortent.co/tools/reinventors
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