

Healthcare operators for diligence, growth, transformation, and leadership execution

DRI helps private equity firms, growth investors, and healthcare portfolio companies move faster at critical inflection points with healthcare-specialized operating partners, interim leadership, and executive talent support.

Investment Support

- › Market, management & commercial diligence
- › Executive assessment and referencing
- › Product, technology & AI evaluation
- › Finance readiness and succession-risk review

Portfolio Value Creation

- › 100-day planning and execution cadence
- › Go-to-market strategy and commercial acceleration
- › Growth, marketing & sales transformation
- › Pricing, segmentation & pipeline improvement

Talent & Leadership

- › Executive search for CEOs and functional leaders
- › Interim executive deployment
- › Succession planning and leadership assessment
- › Onboarding and role design support

WHEN CLIENTS ENGAGE DRI

Diligence Sprint

Market, management & commercial diligence before close

100-Day Execution

Operating cadence, KPIs, and post-close acceleration

GTM Reset

Commercial engine rebuild for underperforming portcos

Interim Leadership

Fractional executives during critical transitions

Executive Search

CEO, CFO, CRO, CPO, and functional leaders

Exit Readiness

Management upgrade, operating discipline, and narrative

CORE OPERATING CAPABILITIES

Commercial Growth & Go-to-Market

- Go-to-market strategy and execution
- Growth acceleration and commercial diagnostics
- Marketing transformation and demand generation
- Sales process redesign and productivity improvement
- Pricing, packaging, segmentation, and positioning
- Partnerships, channels, and business development

Product, Technology & AI

- Product strategy and roadmap prioritization
- Product-market fit assessment
- Technology leadership support
- Digital transformation and workflow alignment
- AI strategy, readiness, and practical deployment assessment

Finance, Strategy & Corporate Development

- Strategic finance and performance management
- Capital planning and resource allocation
- Corporate development and M&A support
- Board-level planning and operating reviews
- Strategic prioritization tied to value creation goals

Operations, Clinical, People & Leadership

- Operating model design and scaling support
- Clinical and care-delivery alignment
- Organizational design and leadership effectiveness
- Talent assessment and succession planning
- Interim and succession coverage during transitions

WHY DRI

- › Healthcare-specialized operators with functional depth
- › Support designed for both investors and portfolio companies
- › Execution-oriented — built around sponsor outcomes
- › One platform spanning advisory, interim leadership, and executive talent
- › Flexible deployment from diligence through exit
- › Deployable by use case, not just by practice area

How we work & what makes us different

Practical, execution-oriented support built around the realities of healthcare investing

REPRESENTATIVE ENGAGEMENTS

Diligence sprint

Commercial, product & management diligence for a healthcare technology investment prior to close

100-day execution

Operating plan and KPI cadence for a newly acquired digital health platform

GTM reset

Commercial engine rebuild for a portfolio company missing revenue targets

Product & AI review

Roadmap assessment and AI readiness evaluation for a tech-enabled healthcare business

Interim leadership

Fractional executive support bridging a CEO and CRO transition at a growth-stage company

Exit preparation

Management upgrade, operating discipline, and pre-recapitalization readiness support

THE INVESTMENT LIFECYCLE

- 1 **Pre-close diligence**
Market, commercial, management, product & AI assessment to inform the investment decision

- 2 **100-day planning**
Execution cadence, operating priorities, and leadership alignment after close

- 3 **Growth & transformation**
GTM reset, commercial acceleration, product improvement, and scaling infrastructure

- 4 **Talent & leadership**
Interim executives, executive search, and succession planning at critical transitions

- 5 **Exit readiness**
Operating upgrade, narrative development, and pre-process management preparation

WHAT MAKES DRI DIFFERENT

- 01 **Operators, not consultants**
Our bench has built and scaled healthcare businesses — not just advised them. We bring firsthand experience running companies through the same inflection points our clients face.

- 02 **One integrated platform**
Advisory, interim leadership, and executive search in a single model — so investors and portfolio companies don't have to manage multiple vendors at a critical moment.

- 03 **Healthcare-native expertise**
Deep knowledge of buying dynamics, clinical workflows, reimbursement complexity, and regulatory requirements across payer, provider, and life sciences markets.

- 04 **Flexible, outcome-oriented engagement**
From a focused two-week diligence sprint to a six-month fractional executive deployment — structured around sponsor outcomes, not billable hours.

ENGAGEMENT MODEL

Advisory & Operating Support

- Embedded operating partner support
- Strategic and functional advisory
- Board and investor support
- Diligence and deal support

Fractional & Interim Leadership

- Fractional C-suite executives
- Interim leadership during transitions
- Project-based functional leadership
- Onboarding support for new hires

Executive Search & Talent

- CEO, CFO, CRO, CPO, and CMO search
- Functional and operational leaders
- Succession planning and assessment
- Portfolio-wide talent strategy

Ready to move faster at your next inflection point?

DRI Healthcare Operating Advisory works with PE firms, growth investors, and portfolio companies across the full investment lifecycle — from diligence through exit.

[directrecruiters.com](https://www.directrecruiters.com)
Healthcare Operator Advisory