

# DEERFIELD INTELLIGENCE

## Director of Operations Assessment

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Operational Gap Assessment, 90-Day Plan, and Cross-Functional Coordination Model  
*"Professionalized Agility"*

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**Interviews:** 6 stakeholders (CIO, 2 Pod Leads, HR, Finance, Compliance)

## Executive Summary

Deerfield Intelligence has built an exceptional team of engineers and data scientists delivering real value to the investment side of the firm — from real-time FDA advisory meeting analysis to clinical trial prediction models. The talent is world-class, the mission is compelling, and the ambition to scale from 10 to 30 people while building a repeatable startup incubation engine is both exciting and achievable.

However, Intelligence is currently building on what David Chen described as a **"foundation of sand."** After interviewing all six stakeholders, a clear picture emerged: every function is operating reactively, spending 20–30% of their time on operational overhead that should not fall on their shoulders. The same pattern appeared in every interview: people find out too late, information doesn't flow, and everyone is individually compensating for systemic gaps.

Stakeholder	Finds Out Too Late About...	Wants to Become...
<b>Marcus (Pod Lead)</b>	Projects via hallway conversations	Strategic instead of reactive
<b>Priya (Pod Lead)</b>	Deadlines and dependencies via Slack	"An engineer again"
<b>Elena (HR)</b>	Hiring needs via ad-hoc messages	Strategic on talent, not firefighting
<b>James (Finance)</b>	\$50K contracts after they're signed	A partner, not a forensic accountant
<b>Sarah (Compliance)</b>	AI tools after they're already built	A partner, not a last-minute hurdle
<b>David (CIO)</b>	Everything; as every decision routes through him	The visionary, not the operator

### OPERATING MODEL: "Professionalized Agility" (David Chen)

Director of Operations role in 3 modes (*Detailed coordination model in Part 3*):

- Acting as COO inside Intelligence
- Strategic Partner with investment partners
- Reputation Manager with broader Deerfield

### DESIGN PRINCIPLE (Unanimous Across All 6 Stakeholders)

"Keep the agility, lose the chaos." Build just enough structure to eliminate operational noise without adding bureaucracy.

Marcus: "Keep the agility, lose the chaos" | Priya: "No twenty forms to change a line of code"

Elena: "High-performance machine, not bureaucratic" | James: "Information, not permission"

Sarah: "Get us talking earlier — that's 80% of the battle" | David: "If it doesn't clear the path, it shouldn't exist"

**PRIORITIZATION FRAMEWORK: "Engineering Friction" (David Chen, validated by all stakeholders)**

P0 = If it's stopping pods from shipping code or serving portfolio companies, fix it now

P1 = If it slows down scaling from 10 to 30, build it next

P2 = If it enables cross-team effectiveness, systematize it

P3 = If it enables the long-term vision, plan it for Q2

Layered with impact vs. effort: prioritize quick wins that build credibility and create immediate value

## Part 1: Operational Gap Assessment

Twelve operational gaps were identified across six stakeholder interviews and prioritized using an impact vs effort assessment; as well as CIO's "engineering friction" framework: if it's stopping pods from shipping, fix it first.

### Priority Overview

	Operational Gap	Raised By (#Stakeholders)	What's Breaking (Evidence from Interviews)
<b>P0 STOP THE BLEEDING — High impact, fast to implement</b>			
<b>P0</b>	<b>No vendor/procurement process</b>	4 of 6	<b>\$40K+</b> wasted on unused auto-renewal   <b>3 duplicate tools</b> running   <b>30%</b> of Pod Lead's time on procurement
<b>P0</b>	<b>No intake or scoping process</b>	4 of 6	<b>6-week delays</b> from unscoped cross-pod promises   Projects arrive via <b>hallway conversations</b> with no capacity check
<b>P0</b>	<b>No cross-pod visibility</b>	5 of 6	<b>CIO can't see project status</b> without hunting people down   Cross-pod dependencies cause <b>surprise deadline failures</b>
<b>P0</b>	<b>Compliance "black box"</b>	3 of 6	<b>3 days to 3 weeks</b> review variance   Blocks launches and incubation spin-outs
<b>P1 BUILD FOR SCALE — High impact, moderate effort</b>			
<b>P1</b>	<b>Broken onboarding</b>	4 of 6	<b>3–4 weeks</b> to productivity per hire   Last hire couldn't commit code for <b>3 weeks</b> due to access issues
<b>P1</b>	<b>No recruiting pipeline</b>	2 of 6	<b>4-month</b> hiring cycles   <b>2 candidates lost to Google</b>   No headcount roadmap for 10→30
<b>P1</b>	<b>No financial visibility</b>	3 of 6	<b>40% cloud overspend</b> in one quarter   Can't prove ROI to partners   No financial model for growth

P2 SYSTEMATIZE — Builds on P0/P1 foundations, higher effort			
P2	No documentation	3 of 6	Key-person risk across both pods   Tribal knowledge suppresses hiring and slows onboarding
P2	Shared services deprioritize Intelligence	3 of 6	“Back of the line” behind investment side for IT, Legal, Finance   New hires wait weeks for access
P3 LONG-TERM VISION — Plan now, execute Q2 after foundation is solid			
P3	No incubation playbook	2 of 6	3 spin-outs with zero repeatable framework   Engineers stuck on post-spin-out tech support
P3	No career paths	1 of 6	2 departures already   No growth trajectory   Retention risk compounds at 30
P3	Cultural island effect	2 of 6	Territorial tension with investment side   No value narrative   Hinders specialized support

## Part 2: 90-Day Operational Plan

*This plan is sequenced so each phase builds on the previous one. P0 quick wins create immediate credibility and cost savings. P1 builds the infrastructure that P2 depends on. Every initiative passes the test: **does it reduce engineering friction without adding bureaucracy?***

### CIO's DAY-ONE DELEGATION (confirmed in the interview)

- All vendor/procurement management ("If I never look at another SaaS contract, it'll be too soon")
- First-pass hiring pipeline ("Filter resumes and tell me 'these three are worth your time'")
- Intake enforcement with partners ("You have my full backing. Hold the line.")
- Corporate translation meetings ("Be the one who speaks Finance and Corporate so I don't have to")

## Phase 1: Stop the Bleeding (Days 1–30)

Objective: Eliminate immediate financial waste, establish trust, and deploy the foundational processes everything else builds on.

Initiative	What It Looks Like	Timeline	Key Deliverable
<b>1.1 Vendor Audit &amp; Procurement Process</b>	<p><b>Week 1–2:</b> Full vendor audit with James. Cancel duplicates (3 data viz tools) and unused auto-renewals (\$40K+). Immediate cost savings.</p> <p><b>Week 3–4:</b> Shared vendor tracker with "heads-up" step for major spend. James's principle: information, not permission.</p>	Week 1–4	Live vendor tracker with all active contracts, costs, and renewal dates
<b>1.2 Intake &amp; Scoping Framework</b>	<p><b>Week 2–3:</b> Lightweight intake form: project description, stakeholder, scope, dependencies, compliance needs, budget impact. One form triggers workflows to Compliance, Finance, and pod leads simultaneously.</p> <p><b>Week 4:</b> Monthly prioritization meeting with David and pod leads. Partners submit through intake before committing to CEOs.</p>	Week 2–4	Intake form live; first prioritization meeting held with David and pod leads
<b>1.3 Cross-Pod Visibility &amp; Tracking</b>	<p><b>Week 2–3:</b> Lightweight project board (Jira/Asana/Linear). Every project: owner, status, dependencies, timeline, compliance status.</p> <p><b>Week 3–4:</b> Weekly 30-min pod lead sync (Marcus's idea): dependencies, blockers, capacity. David joins monthly, not weekly.</p>	Week 2–4	Project dashboard live; weekly pod lead sync running
<b>1.4 Compliance Pre-Flight Checklist</b>	<p><b>Week 2–3:</b> Co-design with Sarah: data flow diagrams, vendor details, access lists, use case/intent, third-party AI involvement. Baked into intake — not a separate step. Also lays groundwork for incubation compliance.</p>	Week 2–4	Pre-flight checklist integrated into intake; indicative SLAs published

	<b>Week 4:</b> Indicative SLAs: standard reviews 3–5 days, novel reviews 10 days.		
<b>1.5 Listening Tour</b>	<b>Week 1–2:</b> 1:1s with every team member, key investment partners, shared service leads. Build relationships before implementing changes. Surface blind spots.	Week 1–2	Validated pain points; relationships established with all key stakeholders

### ★ PHASE 1 MILESTONE (Day 30)

Marcus has his "shield" — data to say "not yet" without it feeling personal  
 Priya never chases another vendor contract — Ops handles the handoff  
 Sarah reviews during design, not after launch — compliance is baked in  
 James has real-time vendor visibility — no more surprise invoices  
 David is no longer the bottleneck for intake or procurement decisions  
 Immediate cost savings from duplicate/unused tool elimination

## Phase 2: Build the Foundation for Scale (Days 31–60)

Objective: Prepare the infrastructure for 10→30 growth. Create the systems that make hiring, budgeting, and onboarding scalable.

Initiative	What It Looks Like	Timeline	Key Deliverable
<b>2.1 Onboarding Overhaul</b>	Co-create with Elena, Marcus, Priya. Components: pre-provisioned access (day one, not day fifteen), technical guide (stack, repos, CI/CD, schemas, deployment), stakeholder map, first-week roadmap with milestones, buddy system (not the pod lead). <b>Target: time-to-productivity from 3–4 weeks to under 1 week.</b>	Week 5–8	Intelligence onboarding playbook ready for next hire; access pre-provisioning checklist with IT
<b>2.2 Recruiting Pipeline</b>	<b>Week 5–6:</b> Recruiting playbook with Elena: standardized interview loops, role scorecards, candidate communication timeline. <b>Week 7–8:</b> Headcount plan: which roles, in what sequence, tied to which projects, with infrastructure costs.	Week 5–8	Recruiting playbook live; 18-month headcount roadmap with financial model
<b>2.3 Pod-Level Budget &amp; ROI</b>	<b>Week 5–7:</b> Slice budget by pod with James. Monthly spend review. Pod leads get visibility into their numbers. <b>Week 8:</b> First ROI tracking template: link project costs to outcomes. Transforms partner conversations from defending costs to justifying investments.	Week 5–8	Pod-level budgets allocated; first project-level ROI report for partner meeting

### ★ PHASE 2 MILESTONE (Day 60)

New hires productive in under 1 week instead of 3–4 weeks

Recruiting playbook live — Elena transforms from reactive to strategic

Headcount plan gives David an executable growth roadmap, not an aspiration

James has pod-level budget data and first ROI metrics for partner meetings

David stops being the middleman for every budget question and resume review

## Phase 3: Systematize & Scale (Days 61–90)

Objective: Transition from firefighting to strategic operations. Reduce key-person risk, build bridges with broader Deerfield, and set the stage for Q2 initiatives.

Initiative	What It Looks Like	Timeline	Key Deliverable
<b>3.1 Documentation Sprint</b>	Facilitate focused documentation across both pods: code architecture, deployment processes, decision logs, project inventory, vendor registry. Minimum viable “source of truth” — not a documentation bureaucracy.	Week 9–12	Internal wiki or knowledge base with architecture docs, deployment guides, and stakeholder map
<b>3.2 Shared Services Advocacy</b>	Establish regular touchpoints with IT, Legal, Finance. Create “dedicated lanes” for Intelligence. Be the “shock absorber” (David’s term) between Intelligence and the firm. Begin telling the value story.	Week 9–12	Standing meetings with IT and Legal; first quarterly value report drafted for partners
<b>3.3 Retrospective &amp; Year-One Roadmap</b>	Retrospective with all stakeholders: what’s working, what needs adjustment. Present Year-One roadmap including Q2 priorities: • Incubation playbook • Career paths & performance framework • Portfolio company deployment framework • Advanced financial modeling	Week 12	90-day retrospective completed; Year-One roadmap approved by David

### ★ PHASE 3 MILESTONE (Day 90)

Key-person risk mitigated through documentation

Intelligence has “dedicated lanes” with shared services — no longer just another ticket

Value story is being told proactively to partners and the broader firm

Year-One roadmap approved by David — clear path to Q2 initiatives

Every stakeholder has shifted from reactive to strategic



## 90-Day Visual Timeline

The following timeline shows initiative sequencing, overlaps, and key milestones across the 90-day plan.

	PHASE 1: Stop the Bleeding				PHASE 2: Build Foundation				PHASE 3: Systematize			
Initiative	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12
1.1 Vendor Audit				★								
1.2 Intake Process				★								
1.3 Cross-Pod Visibility				★								
1.4 Compliance Checklist			★									
1.5 Listening Tour		★										
2.1 Onboarding Overhaul					★							
2.2 Recruiting Pipeline						★						
2.3 Budget & ROI							★					
3.1 Documentation Sprint										★		
3.2 Shared Services									★			
3.3 Retrospective												★

■ P0: Stop the Bleeding

■ P1: Build Foundation

■ P2: Systematize

★ Milestone / Quick Win

## Part 3: Cross-Functional Coordination Model

David Chen framed the ideal operating model as **"Professionalized Agility"**.

This section defines how the Director of Operations coordinates with each function to make that model operational, with three distinct modes depending on the audience.

### MODE 1: COO-AS-A-SERVICE (Inside Intelligence — Pods & Engineers)

Philosophy: Handle the friction so pods can run like startups. Protect speed and autonomy.

The Dir. of Ops is NOT a layer of management on top of pods. The role sits alongside them, absorbing operational overhead so engineers can engineer.

Pod leads retain full ownership of their roadmap, architecture decisions, and engineering execution.

The Dir. of Ops owns: intake/scoping, vendor management, cross-pod coordination, budget tracking, onboarding, and compliance navigation.

### MODE 2: STRATEGIC PARTNER (With Investment Partners)

Philosophy: Intelligence is a core part of the investment thesis, not a help desk.

The Dir. of Ops manages the intake process and serves as the first point of contact for new requests from partners.

With David's full backing, the Dir. of Ops can diplomatically hold the line: "We'd love to help — here's the intake process and the current roadmap."

David handles high-level strategy and the "yes." The Dir. of Ops handles coordination and the "not yet."

Goal: Partners trust the system because the system actually works. They stop bypassing the process because they see results.

### MODE 3: REPUTATION MANAGER & BRIDGE BUILDER (With Broader Deerfield)

Philosophy: Manage Intelligence's reputation within the firm. Tell the value story.

David: "You're not just managing our ops; you're managing our reputation within the broader firm."

The Dir. of Ops translates between "tech speak" and "corporate/finance speak" so David doesn't have to.

Proactively communicates wins: "Here's what Intelligence delivered this quarter, here's the ROI."

Addresses the "cultural island" effect by building bridges — so the firm sees Intelligence as an investment with returns, not an expensive science project.

## Coordination Model by Function

The Dir. of Ops serves as the single coordination point between Intelligence and every internal and external stakeholder.

## The Coordination Hub

Stakeholder	Role of Dir. of Ops	Key Interactions & Agenda	Cadence	Outcome
<b>David (CIO)</b>	Chief of Staff	<ul style="list-style-type: none"> <li>• Own vendor/procurement, hiring first-pass, corporate translation</li> <li>• Enforce intake with partners (with CIO backing)</li> <li>• Report: project status, budget health, hiring pipeline</li> </ul>	Monthly 1:1; async via dashboard	David focuses on vision, not ops
<b>Marcus &amp; Priya (Pod Leads)</b>	Ops shield & enabler	<ul style="list-style-type: none"> <li>• Handle all intake/scoping and “not yet” conversations</li> <li>• Take over vendor relationships and procurement</li> <li>• Facilitate sync: dependencies, blockers, capacity</li> <li>• Run onboarding playbook; first-pass hiring pipeline</li> </ul>	Weekly sync (30 min); David joins monthly	Pod leads engineer, not administrate
<b>Elena (HR)</b>	Inside partner	<ul style="list-style-type: none"> <li>• Own recruiting pipeline: filter, schedule, bring finalists</li> <li>• Co-create Intelligence onboarding (Ops: technical; Elena: Deerfield)</li> <li>• Build career paths (IC → Lead → Principal); monitor retention</li> </ul>	Weekly (15 min) if hiring; monthly otherwise	Elena shifts from reactive to strategic
<b>James (Finance)</b>	Budget bridge	<ul style="list-style-type: none"> <li>• Own vendor tracker; evaluate procurement tooling (e.g. Vertice)</li> <li>• Slice budgets by pod; build project-level ROI tracking</li> <li>• Co-build financial model for 10→30 growth plan</li> </ul>	Monthly spend review; quarterly planning	From forensic accountant to strategic partner
<b>Sarah (Compliance)</b>	Documentation bridge	<ul style="list-style-type: none"> <li>• Bake pre-flight into intake: data flows, access lists, AI involvement</li> <li>• Track down documentation so Sarah doesn’t chase engineers</li> <li>• Set indicative SLAs: 3–5 days standard, 10 days novel</li> </ul>	Biweekly pipeline review	Compliance as partner, not launch blocker
<b>IT / Shared Services</b>	Single point of contact	<ul style="list-style-type: none"> <li>• Establish “dedicated lanes” for Intelligence requests</li> <li>• Pre-built access provisioning checklist for new hires</li> </ul>	Monthly check-in	Off the back of the line
<b>Investment Partners</b>	Strategic interface	<ul style="list-style-type: none"> <li>• Route all requests through intake; manage “not yet”</li> <li>• Provide clear window into roadmap and capacity</li> <li>• Quarterly value report: what Intelligence delivered and ROI</li> </ul>	Intake (continuous); quarterly value report	Trust the system; stop bypassing

## Systems & Tools Established by Day 90

System / Tool	What It Does	Replaces
<b>Vendor Tracker</b>	Living doc of active vendors, costs, renewal dates, owners. “Heads-up” step for major spend. Evaluate Vertice for centralized procurement.	<i>Surprise invoices, duplicate tools, \$40K auto-renewals</i>
<b>Intake Form</b>	Single entry point for all project requests. Captures scope, stakeholder, dependencies, compliance needs, budget impact. Triggers workflows to Compliance, Finance, and pod leads simultaneously.	<i>Hallway conversations, Slack requests, coffee machine commitments</i>
<b>Project Dashboard</b>	All active work visible: owner, status, dependencies, timeline, compliance status. Lightweight (Jira/Asana/Linear) — not an enterprise rollout.	<i>Hunting people down, Slack archaeology, “I didn’t know about that”</i>
<b>Compliance Pre-Flight</b>	Checklist baked into intake: data flows, vendor details, access lists, AI involvement. Triggers Sarah’s review at design, not after launch.	<i>Reverse-engineering completed tools, 3-day to 3-week review variance</i>
<b>Onboarding Playbook</b>	Pre-provisioned access, technical guide, stakeholder map, first-week milestones, buddy assignment. Co-created with Elena, Marcus, Priya.	<i>“Here’s your laptop, here’s Slack, good luck”</i>

## Success Metrics

Metric	Current State	90-Day Target
<b>Vendor cost savings</b>	Unknown (no tracking; \$40K+ waste identified)	Duplicates eliminated; all vendors tracked
<b>Compliance predictability</b>	3 days to 3 weeks (no SLA)	Indicative SLAs; pre-flight checklist live
<b>Project visibility</b>	“Best guess” from Slack	100% projects in shared dashboard
<b>Budget surprises</b>	Found out at quarterly close	Real-time pod-level visibility
<b>Pod lead ops overhead</b>	20–30% of time on ops work	< 10% target
<b>Intake adoption</b>	No process exists	100% of requests through intake
<b>Hiring cycle time</b>	4 months per hire	Playbook live; targeting < 8 weeks
<b>Time-to-productivity</b>	3–4 weeks	< 1 week
<b>ROI visibility</b>	“Hand-wavy” (James)	First project-level ROI metrics
<b>CIO bottleneck</b>	Single decision point for everything	Vendors, hiring, intake, corporate → delegated

## Closing

This assessment surfaced twelve operational gaps, but they all trace back to one root cause: Intelligence has no operational layer connecting its brilliant technical team to the rest of the organization. Every recommendation in this document is designed to build that layer — quickly, pragmatically, and with the lightest possible touch.

The 90-day plan delivers immediate cost savings (P0), scales hiring and budget infrastructure (P1), and systematizes for the long term (P2). The cross-functional coordination model ensures every corporate function shifts from reactive to strategic. And the prioritization framework — CIO's own “engineering friction” test — ensures we stay focused on what matters: clearing the path so the pods can ship.

*“If you can get us to a place where I’m not the bottleneck for every \$5K expense or every ‘can we do this’ conversation, we’ve won.”*

— David Chen, CIO

**The foundation of sand becomes solid ground. The chaos becomes professionalized agility. I’m ready to build it.**