HOW A TOP PE FIRM ADVANCED ITS INVESTMENT PROCESS WITH AUTOMATION AND AI

When the scale of investment opportunities expanded for a private equity giant, with over $100 billion in Assets Under Management (AUM), they were faced with serious operational bottlenecks. As the investment pipeline grew, using traditional processes to prepare Investment Committee (IC) memos became more tedious, time-consuming, and prone to inconsistencies.

Manual memo preparation was labor-intensive and slowed decision-making

The deal team manually compiled financials, operational metrics, market intelligence, and other data from scattered sources, which consumed significant time and led to inconsistencies. It also meant time lost aligning on deals that don't fit the fund thesis due to a lack of integrated insights across portfolio data and market trends. This not only made IC memo creation slow and cumbersome, but also impacted investment decisions.

Accuracy and speed were paramount to investment execution, and the firm recognized that continuing with manual processes could limit its ability to move quickly on high-value investment opportunities.

How Kairos by Brownloop automated and scaled the IC memo process

The firm partnered with Brownloop to implement an AI-driven solution that is purpose-built for private equity. Integrating seamlessly into their existing systems with minimal disruptions, Kairos transformed the IC memo workflow by helping to automate every step and preserving control through human-in-the-loop architecture.

From aggregating deal data and analyzing financials to building investor-ready outputs, Kairos led the IC memo generation by enabling analysts to focus on higher-value tasks. It unified data aggregation across internal databases and third-party systems, including data rooms, automatically categorizing and extracting insights from documents, spreadsheets, call tran-scripts, and other sources.

Instead of relying on spreadsheets, the analysts took advantage of Brownloop's scalable, secure infrastruc-ture that supports customizable templates trained on the firm's existing IC memos and internal requirements. Now, they can seamlessly integrate several data sources, upload documents, and instantly engage with insights using the chat function.This ensured outputs that were accurate and explainable, with end users retaining the ability to review and override the generated content.

THE RESULTS

70% faster
memo generation

With the automation of data collation, analysis, and reporting, analysts reclaimed valuable hours for deeper due diligence and value assessment.

Simpler interactions,
better outcomes

Analysts could ask queries, analyze, and extract insights from portfolio materials in plain English, eliminating the need for manual data retrieval and supporting teams with faster decision-making.

Instant
data extraction

Teams were able to upload board meeting materials and instantly extract insights through contextual chat, enabling quicker decision-making.

Efficient
workflow automation

Kairos turned multiple use cases across finance teams into applications with embedded AI, ensuring business process automation.

Faster
investment decisions

With real-time data insights and enhanced visibility into key metrics and trends, the Investment Committee could evaluate deals confidently and assess the potential risks and rewards of each investment opportunity.

Brownloop's partnership positioned the firm to meet today's market demands while laying the groundwork for future innovation in deal management, risk assessment, and portfolio optimization.

Schedule a demo with Brownloop and see how Kairos can help your firm move faster, smarter, and at scale.

REQUEST A DEMO

ABOUT BROWNLOOP

Brownloop is a leading fintech provider and expert consulting firm dedicated to transforming private equity (PE) firms. Through cutting-edge AI, data analytics, and premium consulting services, we empower PE firms by converting data chaos into strategic clarity. Our comprehensive, bespoke solutions span the entire investment lifecycle, from deal sourcing to exit strategy, enabling precise decisions and a competitive edge.

Learn more at **https://www.brownloop.com/**