



TRANSFORMING OPERATIONS AT A  
**Global Private Equity Firm**  
With AI And Automation

CASE STUDY



# Introduction

A global private equity leader with over \$100 billion in assets under management (AUM), focusing on enterprise software, data, and technology-enabled businesses, was proactively reimagining its operations to stay ahead in a fast-evolving PE landscape. As its portfolio and operational scope expanded, the firm sought to modernize its processes, unify enterprise data, and embed AI into key workflows to improve agility, scale efficiently, and strengthen decision-making.

Since 2023, the firm has partnered with Brownloop to design and deliver solutions spanning data infrastructure, analytics, automation, and AI. This collaboration blends Brownloop's product capabilities with deep consulting expertise, enabling the firm to streamline operations, enhance reporting accuracy, and roll out AI-powered applications across multiple business functions.

## Unifying data and streamlining operations for smarter decision-making

With a robust investment strategy in place, the firm saw an opportunity to further enhance its capabilities by automating manual workflows, unifying enterprise data, and accelerating decision-making. Core workflows, such as LP (Limited Partner) reporting, treasury processing, and performance tracking, were being managed through multiple third-party systems, including Sage, Concur, Gen II, Harmonic, and IVP. The objective was to bring these disparate data sources together to improve efficiency and ensure decisions were backed by timely, consistent insights.

In finance, reporting processes were largely spreadsheet-driven and manual, limiting real-time visibility and requiring significant effort to compile portfolio-wide views. This made it difficult to respond quickly to stakeholder requests or run consistent analyses across portfolios.

Treasury teams identified an opportunity to improve compliance and speed by digitizing LP (Limited Partner) wire instructions and distribution workflows, thereby reducing reliance on spreadsheets and email-based approvals. Meanwhile, HR teams were encumbered by year-end performance reviews that took weeks to complete, since the feedback and scoring processes were managed manually.

Value creation leaders, tasked with driving efficiency across portfolio companies, lacked visibility into software engineering performance. Without access to standardized development metrics or benchmarking tools, it was challenging to measure engineering productivity or identify areas for operational improvement across technical teams.

## Partnering to identify and operationalize AI use cases

Working closely with the firm's technology and business teams, Brownloop conducted a structured assessment of AI opportunities across the enterprise. Together, we identified high-impact use cases across Finance, HR, Treasury, Investments, and Value Creation. We identified gaps in various processes, ranging from document intelligence and deal workflow automation to portfolio analytics and performance benchmarking.

The firm adopted Kairos, Brownloop's AI-powered platform purpose-built for private equity, as the foundation for these initiatives. Kairos' use cases included:

- > Natural language querying of the enterprise data warehouse, enabling the seamless extraction of insights across portfolio operations.
- > Briefing and insights agents for marketing and business development teams, providing real-time, actionable intelligence to enhance decision-making.
- > Historical document analysis, including DDQs, board decks, and other critical materials, to streamline data extraction and analysis for quicker, more informed decisions.

The result was a practical, scalable approach to embedding AI in day-to-day operations.

## Document-heavy teams lacked tools for automation and insight extraction

Investment and legal teams were under pressure to evaluate increasing volumes of Confidential Information Memorandums (CIMs), investor reports, board materials, and internal documents. Yet, their workflows remained entirely manual. Brownloop identified an opportunity to empower analysts with AI-driven tools for document intelligence and faster screening. The growing need for applied AI became evident, particularly in workflows like document analysis, early-stage deal evaluation, and internal search. The firm recognized that without automation and insight extraction tools, it was losing valuable time and operating below its potential.



## THE RESULTS



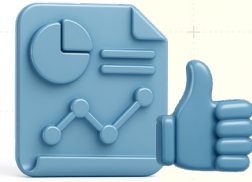
### Faster, more accurate reporting

Created a centralized data lake to unify information from multiple third-party vendors such as Sage, Concur, Gen II, Harmonic, and IVP. Reconciliation frameworks ensured data integrity, while Power BI dashboards automated Limited Partner reporting and generated Private Capital Accounting Protocol (PCAP) statements.



### Simplified, centralized HR reviews

Automated the collation of performance feedback and scoring across departments, delivering structured dashboards and summary views. Year-end appraisal cycles were reduced from weeks to days, and centralized, data-backed processes improved consistency and transparency in promotion decisions.



### Real-time insight into engineering productivity

Integrated GitHub and Copilot APIs across portfolio companies to capture standardized development metrics, such as commits, pull requests, and Copilot usage. Dashboards enabled value creation teams to benchmark engineering productivity and identify high-leverage improvement areas.



### Improved compliance and turnaround in treasury operations

Created a centralized data lake to unify information from multiple third-party vendors such as Sage, Concur, Gen II, Harmonic, and IVP. Reconciliation frameworks ensured data integrity, while Power BI dashboards automated Limited Partner reporting and generated Private Capital Accounting Protocol (PCAP) statements.



### Smarter workflows with embedded AI

Deployed Kairos for natural language querying, briefing agents, and historical document analysis, thus streamlining deal workflows, portfolio analytics, and document intelligence and freeing teams to focus on higher-value strategic initiatives.

“

#### TESTIMONIAL

The transformation enabled the firm to move from siloed, manual workflows to an integrated, AI-augmented operating model. With Kairos as the operational backbone, teams now operate with greater speed, transparency, and precision, positioning the firm to scale efficiently while continuing to lead in a competitive private equity market.

Explore how Brownloop can transform your private equity operations.

[Request a Demo](#)