



# From Fragmentation to Institutional Intelligence:

A Mid-Market PE Firm's AI Maturity Journey.



**\$8.2B**

AUM managed  
by the firm



**8 Months**

Brownloop engagement  
duration



**34%**

Compression in  
teaser-to-IC timeline



**Stage 2 → Stage 4**

AI maturity advancement  
across four PEAK dimensions

## Client Overview

A mid-market growth equity firm managing \$8.2 billion in AUM wanted to strengthen how it captured, governed, and scaled data and intelligence across its investment lifecycle. As the firm expanded its use of AI, it realized that AI adoption was growing faster than the infrastructure supporting it.

## Client Challenges

Three Copilot tools were already in use across the deal team, but CRM, fund administration, and portfolio reporting systems operated independently. Analysts were using AI to accelerate decisions, yet insights remained isolated and were not captured or reused across teams. The firm had AI, but not strategy.



# Brownloop's Solution



## Fragmented Data Across Systems

Teams spent time reconciling information across CRM, fund administration, and portfolio systems instead of focusing on insights. Brownloop centralized data into a governed Snowflake environment.



## Inconsistent AI Workflows

Teams used AI without repeatable processes across investment workflows. Brownloop embedded AI-assisted diligence playbooks into deal processes.



## Lost Institutional Knowledge

Deal insights and IC decisions remained difficult to access and reuse across teams. Brownloop built a knowledge graph connecting historical data and firm knowledge.



## Reactive Portfolio Monitoring

Teams relied on periodic reporting instead of proactive visibility. Brownloop enabled continuous portfolio monitoring and signal detection.

# Brownloop's Approach

Instead of adding more AI tools, Brownloop focused on Kairos, an operating model, where intelligence could compound over time. The foundation was built through three key outputs:

01

## Centralized Data Warehouse

Consolidated deal flow, portfolio operations, fund administration, and LP relationship data into a governed Snowflake environment.

02

## Knowledge Graph

Connected six years of deal history, IC decisions, and institutional knowledge to make insights accessible across teams.

03

## AI-Assisted Diligence Playbooks

Embedded structured AI workflows into diligence and IC memo processes to improve speed, consistency, and decision support.

The firm was able to move from quarterly reporting cycles to continuous portfolio monitoring and real-time signal detection.

# Value-Driven Results



## Accelerated Deal Execution by 34%

The teaser-to-investment committee timeline compressed by 34%, helping deal teams evaluate opportunities faster with more consistent workflows and stronger decision support.



## Advanced AI Maturity Across the Firm

The firm progressed from Stage 2 to Stage 4 across four PEAK dimensions: Data Alignment, Institutional Intelligence, Workflow Automation, and AI Governance, moving beyond isolated AI usage.



## Enabled Continuous Portfolio Intelligence

Portfolio monitoring shifted from quarterly reporting cycles to continuous signal detection, improving visibility into portfolio performance and emerging risks.



## Strengthened LP Confidence

Improved governance, transparency, and institutional intelligence created differentiation in LP conversations and regulatory examinations.

## Conclusion

AI advantage is built on connected data, institutional intelligence, & governed workflows. The PEAK framework helps PE leaders assess their current maturity and identify the capabilities needed to move from experimentation to institutional intelligence.

## Partner With Brownloop Today

Build your AI advantage on knowledge that compounds.

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## About Brownloop

Brownloop is the intelligence core powering private equity firms, transforming how investment teams capture knowledge, make decisions, and operate at scale. Through Kairos, our intelligence platform, and value engineering services, we transform fragmented workflows and knowledge into compounding institutional intelligence. We enable PE firms to build governed AI capabilities, accelerate workflows, and create a lasting competitive advantage.

Learn more at [www.brownloop.com](http://www.brownloop.com)