



GUIDE

7 Modern Workflows to Win Deals Faster in 2026



Most private capital firms sit on networks worth millions in deal flow. The winners have built systems to actually tap into them.

This guide features real workflows from firms like BlackRock (\$13T AUM), Bessemer Venture Partners, SpeedInvest (€1.2B), and Notable Capital (\$5B). You'll see how they win proprietary deals in days, reclaim hundreds of hours, and prevent critical relationships from going cold.

What's inside:

- 7 modern workflows solving the biggest challenges in private capital
- Measurable results: time saved, deals won, relationships preserved
- Real implementations with specific architecture details
- What worked, what didn't, and why it matters

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Workflow 1: The banker coverage system

Investment firms lose deals because their banker relationships go cold. By the time they realize it, the opportunities are gone.



The problem

Lukas Huber manages relationships at **Speedinvest**, a €1.2B European VC spanning six offices. Each team member maintains 20-30 critical LP relationships—the gatekeepers to early deal flow.

“The touchpoints were fragmented and the manual work felt more like a hassle than a benefit,” Lukas said. “We missed some opportunities and it was hard to have clear accountability.”

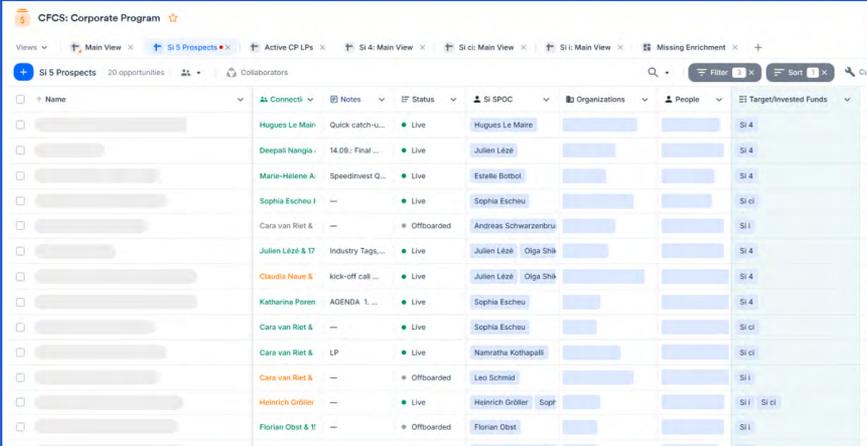
The core issue: relationship decay happens silently. By the time you realize you haven’t spoken to a key LP in three months, you’ve already lost their current deal flow.

What SpeedInvest built

Three components that run automatically:

1. Visual relationship alerts

Their LP list shows relationship strength in real time. Orange text flags relationships weakening (no contact in 60+ days), which converts an invisible problem into a visible trigger requiring immediate action. Partner sees alert, sends meeting invite. Takes 30 seconds.



The screenshot shows a table titled "CPCS: Corporate Program" with columns for Name, Connect, Notes, Status, SI SPOC, Organizations, People, and Target/Invested Funds. The Status column contains indicators for "Live", "Offboarded", and "Onboarded". The SI SPOC column lists names like "Hugues Le Maire", "Julien Léze", "Estelle Botbol", "Sophia Escheu", "Andreas Schwarzenbru", "Olga Shk", "Leo Schmid", and "Heinrich Gröller". The Target/Invested Funds column shows values like "SI 4", "SI 1", and "SI 1 | SI 1".

Name	Connect	Notes	Status	SI SPOC	Organizations	People	Target/Invested Funds
[Redacted]	Hugues Le Maire	Quick catch-u...	Live	Hugues Le Maire	[Redacted]	[Redacted]	SI 4
[Redacted]	Deepali Mangla	14.09: Final ...	Live	Julien Léze	[Redacted]	[Redacted]	SI 4
[Redacted]	Marie-Hélène A.	Speedinvest Q...	Live	Estelle Botbol	[Redacted]	[Redacted]	SI 4
[Redacted]	Sophia Escheu	—	Live	Sophia Escheu	[Redacted]	[Redacted]	SI 1
[Redacted]	Cara van Riet &	—	Offboarded	Andreas Schwarzenbru	[Redacted]	[Redacted]	SI 1
[Redacted]	Julien Léze & 17	Industry Tags...	Live	Julien Léze Olga Shk	[Redacted]	[Redacted]	SI 4
[Redacted]	Claudie Naue &	kick-off call ...	Live	Julien Léze Olga Shk	[Redacted]	[Redacted]	SI 4
[Redacted]	Katharina Poren	AGENDA 1...	Live	Sophia Escheu	[Redacted]	[Redacted]	SI 4
[Redacted]	Cara van Riet &	—	Live	Sophia Escheu	[Redacted]	[Redacted]	SI 1
[Redacted]	Cara van Riet &	LP	Live	Namratha Kothappalli	[Redacted]	[Redacted]	SI 1
[Redacted]	Cara van Riet &	—	Offboarded	Leo Schmid	[Redacted]	[Redacted]	SI 1
[Redacted]	Heinrich Gröller	—	Live	Heinrich Gröller Soge	[Redacted]	[Redacted]	SI 1 SI 1
[Redacted]	Florian Obst & I'	—	Offboarded	Florian Obst	[Redacted]	[Redacted]	SI 1

2. Automatic reminder triggers

Set once: "Notify me if any high-priority relationship exceeds 60 days since last contact." The system monitors continuously and alerts arrive before relationships go cold, eliminating the cognitive load of manually tracking dozens of relationships.

3. Coverage dashboards

Leadership sees at a glance: coverage by geography, top bankers by deal quality, which relationships need attention across all six offices. This

prevents the “blind spot problem” where everyone assumes someone else is managing a relationship.

The results

Zero relationships go cold unintentionally. Zero manual hours spent tracking. Complete visibility across offices. Seconds to identify warm paths to target companies.

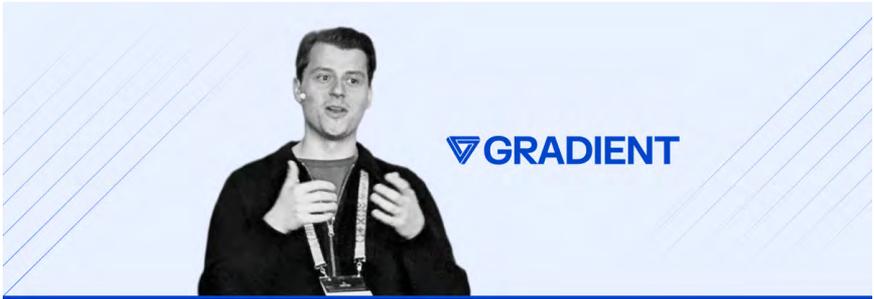
“At firms where bankers play a critical role in early access to high-quality deals, Affinity helps them capture, prioritize, and actively manage these relationships at scale,” Lukas said. “I never miss out on the right deal just because of a blind spot.”

Why it works

The system succeeds because all three layers depend on automatic email and calendar capture. Every interaction gets logged without manual entry, which means adoption becomes inevitable rather than forced. Relationship scores update based on actual communication patterns, not assumptions or manual status updates.

Workflow 2: The 30-second proprietary deal check

The best deals never get banked. By the time a founder has a deck and starts a formal process, they often have four or five term sheets already. The question is: how do you get into those early conversations?



The problem

Andrew Brackin, Partner at **Gradient Ventures**, described today's reality: "The market is more competitive than ever. Companies are raising rounds faster—you see founders leaving companies and raising a seed round as they leave. They might not have a deck yet but have four or five term sheets. You can't wait for them to raise. You have to be nimble and scrappy."

The challenge isn't lacking connections. Most firms have relationships with the founders they want to back. The problem is surfacing those relationships fast enough to act on them.

What Gradient built

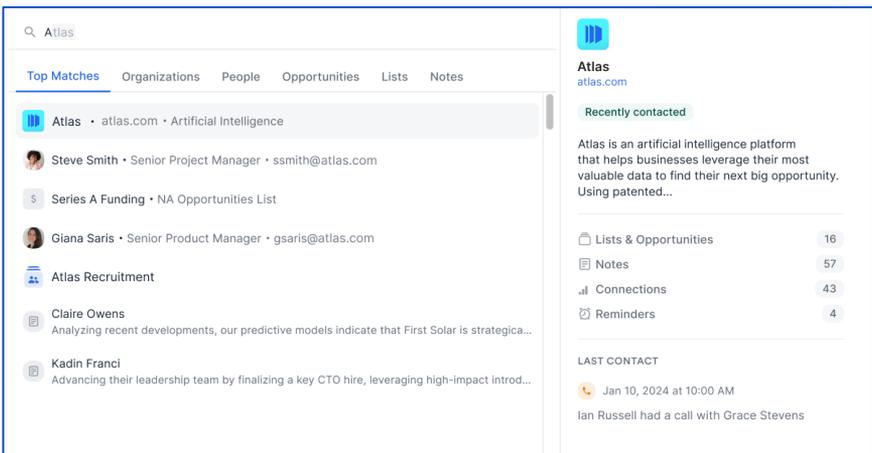
Andrew shared a real investment that started with relationship intelligence: "I was running late to a restaurant and called ahead. An AI assistant

answered—when I arrived, the host said ‘Hi Andrew, we got your message about running late.’ I was blown away.”

The workflow he used:

1. Immediate relationship search

Hear about target company → Search in Affinity (takes 5 seconds) → See who at the firm knows the founder and relationship strength based on actual emails and meetings, not LinkedIn assumptions.



The screenshot shows a search results page for 'Atlas'. The search bar contains 'Atlas'. Below the search bar, there are tabs for 'Top Matches', 'Organizations', 'People', 'Opportunities', 'Lists', and 'Notes'. The 'Top Matches' tab is selected, showing a list of results:

- Atlas** • atlas.com • Artificial Intelligence
- Steve Smith** • Senior Project Manager • ssmith@atlas.com
- Series A Funding** • NA Opportunities List
- Giana Saris** • Senior Product Manager • gsaris@atlas.com
- Atlas Recruitment**
- Claire Owens**
Analyzing recent developments, our predictive models indicate that First Solar is strategica...
- Kadin Franci**
Advancing their leadership team by finalizing a key CTO hire, leveraging high-impact introd...

On the right side of the interface, there is a profile card for 'Atlas' (atlas.com) with a 'Recently contacted' status. Below this, there is a summary of Atlas: 'Atlas is an artificial intelligence platform that helps businesses leverage their most valuable data to find their next big opportunity. Using patented...'. A table shows the number of items for each category:

Category	Count
Lists & Opportunities	16
Notes	57
Connections	43
Reminders	4

Below the table, there is a 'LAST CONTACT' section showing a call on Jan 10, 2024 at 10:00 AM between Ian Russell and Grace Stevens.

2. Strength-based routing

System shows Shelly has the strongest relationship with founder Nikki, measured by communication frequency and recency. This eliminates guessing about who should make the introduction.

3. Warm introduction

Request intro from Shelly → Conversation starts ahead of banking process.

In Andrew’s case: “The moment that company was ready to raise, we’d already spent months chatting. We did the round in a week. Other firms wanted to do it, but we moved super quickly.”

The results

Days to first conversation (not weeks). Significantly higher win rate on proprietary deals. Junior team networks systematically leveraged. Speed advantage when founders have multiple competing term sheets.

Kyle Duffy, Operating Partner at Gradient, explained the advantage: “Unlike platforms that use assumptions built off LinkedIn, Affinity’s relationship intelligence is calculated directly from activity capture—email correspondence and meeting history.”

Why it works

Your firm’s connections already exist in email inboxes and calendar histories. This system surfaces them in 30 seconds by analyzing actual communication patterns, like who emails whom, who meets with whom, how recently, and how frequently. LinkedIn shows who you’re connected to. This approach shows who you actually have relationships with.

Workflow 3: AI meeting prep and follow-up

The cognitive load of relationship management doesn't scale. When you're meeting two to three new executives per week and managing 200 portfolio companies, remembering which connections might be relevant becomes impossible without systems.



The problem

Bailey Dickey leads BD at **Notable Capital** (\$5B AUM, 200 portfolio companies). “We’re meeting two to three new executives per week. The cognitive load of trying to remember which of our 200 portfolio companies might be interesting, what content the team has put out—we created a workflow that allows us to show up better in every conversation and reduce that cognitive load.”

Manual process: 30-45 minutes prep + 20-30 minutes follow-up = 50-80 minutes per meeting. At scale: five to six hours weekly on administrative work instead of relationship building.

What Notable built

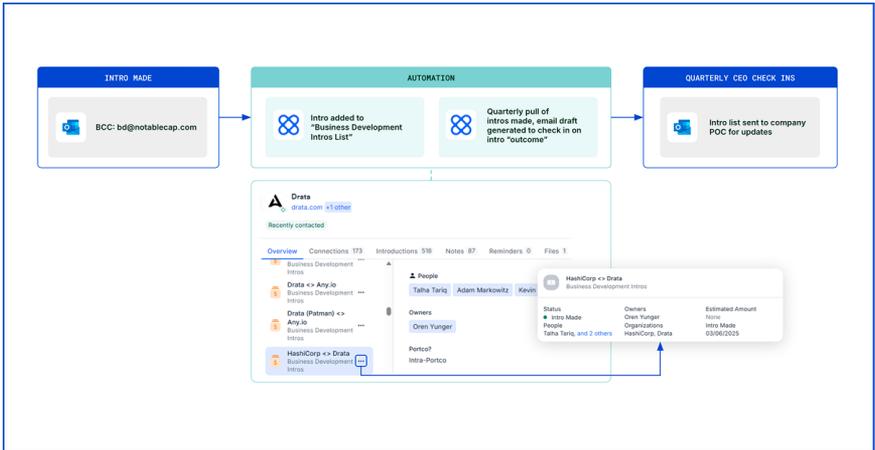
They integrated n8n (automation), Claude (AI), Notion (notes), and Affinity (CRM):

1. Pre-meeting automation (5 minutes)

When meeting scheduled in Affinity → Webhook triggers → Claude researches executive and company → Matches relevant portfolio companies from Notable's 200 → Surfaces relevant content → Creates three Notion docs with full prep. This eliminates manual research and ensures no portfolio connection gets overlooked.

2. Post-meeting automation (5 minutes)

When status updated to “Follow-up” → Claude parses meeting transcript → Generates personalized email referencing specific conversation points → Includes promised portfolio intros → Draft ready for review. This prevents the common failure mode where promised introductions never happen.



3. Shared intelligence layer

Dave Grenitz, Head of IT: “We use Claude as a shared brain across the firm. We feed it data from all systems. It contextualizes and understands what we’re asking for, where to get it. It really supercharges our lean team.”

The results

Bailey: “Within 24 hours of every meeting, we’re sending a follow-up. It’s consistently personalized. We’ve had executives tell us, ‘This is the most relevant portfolio intro I’ve gotten from any VC—you clearly understood our business.’”

40+ hours per month saved for a two-person BD team. 2× meeting capacity (can handle five to six meetings per week vs. two to three). 100% promise tracking (nothing mentioned in a call gets forgotten). Stronger portfolio support brand.

Why it works

AI handles the prep work humans used to do—research, matching relevant connections, drafting initial language. Humans add judgment and personalization. The result is scale without additional headcount, and more importantly, without the quality degradation that typically comes with scaling.

Workflow 4: Breaking the CRM adoption death spiral

CRM adoption in private equity follows a predictable pattern: strong for the first month, then drops off a cliff. The reason is always the same: manual data entry becomes the bottleneck nobody has time for.



The problem

Udai Chopra, Principal at **Future of Work Partners** (spun out from Two Sigma 18 months ago), describes the pattern: “When we’ve set up a CRM in the past, adoption’s good for the first month or two, and then it just drops off a cliff because no one has time.”

The specific pain: “We’ve got 25 people across three offices, but wires are getting crossed. SIMs from bankers are coming to the wrong team members. I need something to remind me when to catch up with bankers. In PE, if I haven’t had the right conversation at the right time, there’s a big risk of missing out on deal opportunities. The consequences can be much bigger than VC.”

What changed at Future of Work

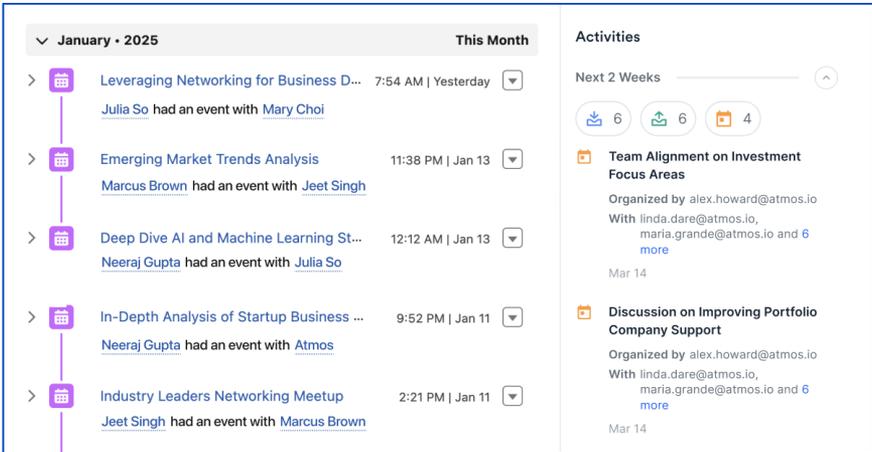
Udai identified the breakthrough: “Meeting investment professionals where they are—that’s always been the biggest challenge.”

The solution: Automatic Outlook integration. “We use Affinity’s Outlook integration, so it’s always on in the background enriching our data set. Which means we’re using it frequently.”

How it works:

1. Automatic activity capture

Email and calendar sync captures every banker interaction without manual logging, which removes the primary reason CRM adoption fails. Nobody wants to spend time on data entry.



The screenshot displays the Affinity CRM interface. On the left, a calendar view for January 2025 shows five events:

- Leveraging Networking for Business D...** (7:54 AM | Yesterday) - Julia So had an event with Mary Choi
- Emerging Market Trends Analysis** (11:38 PM | Jan 13) - Marcus Brown had an event with Jeet Singh
- Deep Dive AI and Machine Learning St...** (12:12 AM | Jan 13) - Neeraj Gupta had an event with Julia So
- In-Depth Analysis of Startup Business ...** (9:52 PM | Jan 11) - Neeraj Gupta had an event with Atmos
- Industry Leaders Networking Meetup** (2:21 PM | Jan 11) - Jeet Singh had an event with Marcus Brown

On the right, the **Activities** panel shows a summary for the next two weeks:

- Next 2 Weeks: 6 events (represented by icons for calendar, email, and calendar).
- Team Alignment on Investment Focus Areas** (Mar 14)
 - Organized by alex.howard@atmos.io
 - With linda.dare@atmos.io, maria.grande@atmos.io and 6 more
- Discussion on Improving Portfolio Company Support** (Mar 14)
 - Organized by alex.howard@atmos.io
 - With linda.dare@atmos.io, maria.grande@atmos.io and 6 more

2. Visual decay indicators

Orange text alerts show weakening relationships at a glance, converting relationship management from a reporting exercise into a tool that prevents embarrassing situations.

3. Cross-platform access

The team can reach out directly from Affinity, or use the Pathfinder

extension in LinkedIn, email, mobile—wherever they actually work. This eliminates tool-switching friction that kills adoption.

The results

Udai identified three reasons this succeeded when others failed: “Vertically focused solution for the investment world. Self-service aspect—I’m impatient and hate waiting for screens to be customized. Flexible data model with bespoke views for deals, networks, relationships, LPs.”

Most importantly: “For me, it’s shifting the mindset from CRM as an admin reporting tool to thinking about it as a strategic enabler, particularly in a world of AI.”

Sustained adoption beyond 90-day failure point. Zero SIMs coming to wrong team members. Full visibility into banker relationships across three offices. Nothing slips through the cracks.

Why it works

The system solves a daily pain point (finding the right person for an intro, preventing relationships from going cold) rather than just creating reports for leadership. Because it works where the team already lives—in email, LinkedIn, and mobile—adoption becomes inevitable rather than aspirational.

Workflow 5: AI categorizes deal flow automatically

Investment firms receive hundreds of inbound companies annually. Each one needs research and categorization: which vertical, which stage, which investor should see it. At five to ten minutes per company, this becomes weeks of manual work, and the bottleneck determines how fast you can move on opportunities.



The problem

Clifford Cohn, Principal at **World Innovation Lab** (US-Japan VC fund), described the pre-automation reality: “Before 2023, it was manual processes with pulling Pitchbook data from frontend reports, manually updating things in Salesforce. It wasn’t very automated or sophisticated.”

The bottleneck: Each company takes five to ten minutes to research and categorize into proper verticals. Hundreds of companies annually equals weeks of work. Plus, inconsistent categorization, wrong investor assignments, and out-of-mandate companies cluttering the pipeline.

What WiL built

They hired a data scientist in 2023 and built AI-powered categorization using Claude and OpenAI:

1. Automatic enrichment trigger

New company added to Affinity → System auto-enriches with Pitchbook, Harmonic, SimilarWeb data → Webhook triggers AI categorization. This creates a complete data foundation before analysis begins.

2. Multi-source AI analysis

Claude analyzes three to four company descriptions → Returns classification across WiL's eight investment verticals using a scoring system. Clifford: "In practice you get back a Python dictionary—eight key-value pairs where 0 is no and 1 is yes."



The image shows a workflow visualization. On the left, a dark box contains a JSON dictionary with eight keys and values (0 or 1). On the right, a REST client interface shows a PATCH request to an Affinity API endpoint. Below the request is a table with three columns for different LLM models and their corresponding outputs.

```

{
  "biotech": 0,
  "life_science": 0,
  "medical_device": 1,
  "therapeutics": 0,
  "deep_tech_energy_and_sustainability": 0,
  "crypto_and_blockchain": 0,
  "defense_tech": 0,
  "silicon_and_other_hardware": 0
}

```

REST Client Interface:

PATCH /v2/lists/{listId}/list-entries/{listEntryId}...

Copy

`https://api.affinity.co/v2/lists/{listId}/list-entries/{listEntryId}/fields`

Biotech (LLM)	Life Science (LLM)	Medical Device (LLM)
0	0	1

3. Intelligent routing

If in-mandate: Assign to sector investor + Slack notification. If out-of-scope:

Flag and archive. This ensures only relevant companies enter an active pipeline, which maintains data quality and focus.

The results

“We moved to Affinity and it’s been great. It’s provided us the flexibility to build automations and workflows in a custom manner that really fits our unique needs. So we have no latency and everything is in one place. This is important for our team—one source of truth and one place we can always go to run our meetings.”

250+ hours per year reclaimed from categorization. 30 seconds per company (down from five to ten minutes). 95%+ accuracy (AI more consistent than humans). Instant assignment to the right investor (no 24-48 hour delay). Clean pipeline with only in-mandate companies in active review.

Bonus application: Network centrality analysis

Clifford: “We extract all the metadata from our Google email and calendar data and we’ve done analysis on centrality—which relationships, which people internally and externally are the most important in terms of driving relationships within our business.”

Why it works

The system succeeds because it’s built on Affinity’s open platform that allows custom integrations. API v2 efficiency means fewer calls to accomplish the same work (8× reduction). Everything centralized means the team knows exactly where to look. Most importantly, AI handles repetitive categorization while humans focus on the actual investment decisions.

Workflow 6: Enabling 70 investors without forcing compliance

Large investment firms face a unique challenge: many decision makers all overseeing different workflows, but the firm still needs consistent data. If you try to force standardization, adoption dies. But allow chaos and you can't operate. The solution requires both flexibility and intelligence.



The problem

Alec McNiff, Senior Manager of Operations at **Bessemer** (R.I.A., 70 investors, 20 partners), faced two challenges:

“For our industry being about investing in technology, sometimes we’re not the best at adopting it. Bessemer is an R.I.A., so it took a long time to adopt AI tools. It took us about a year post-ChatGPT to start working with AI tools.”

“We have 70 investors, 20 different partners who are effectively 20 different CEOs. We have no lead managing partner, so we have 70 different processes. Creating really flexible solutions has been really important for us in driving adoption.”

What Bessemer built

They built “Brain”—their AI system with two core principles:

Principle 1: Enable, don’t prescribe

“Forward deployed engineers” approach: Engineer embeds with investment team for two weeks → Observes actual workflows → Builds automation around their existing process → Iterates based on usage → Expands to next team. This creates 70 different workflows that all feed into the same data foundation.

Principle 2: Humans in the loop

Alec: “We don’t want people just writing memos using Claude. We want to remove the parts of an analyst’s job that really don’t maximize value. If they’re all scraping the same blogs, we’ll just scrape those and provide them so they can spend more time having introductions, meeting people, building relationships.”

The technical implementation:

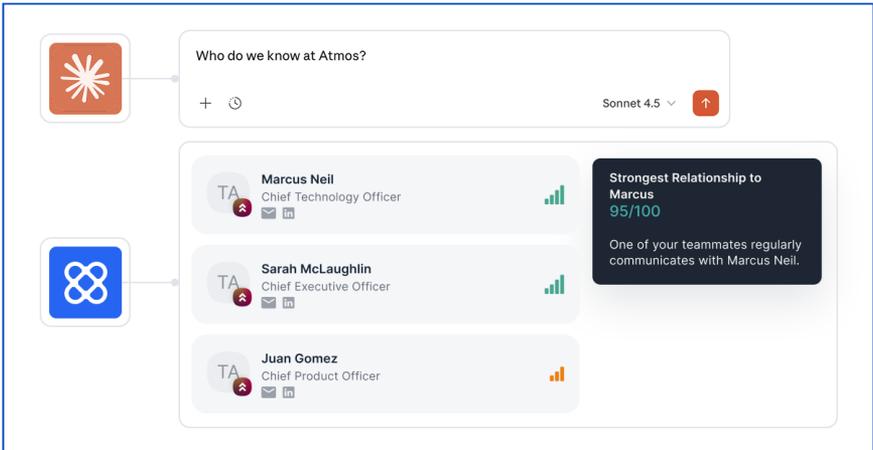
“We locally hosted a version of Claude and connected the MCP to all of our systems—Salesforce, Affinity, data sources—so people can just query for quick natural language questions. That’s what’s been used the most by investors.”

How investors use it:

- “Who do we know at [Company]?” → Queries Affinity
- “Show me our AI investments from last three years” → Queries Salesforce & Affinity

- “What’s the deal history with [Founder]?” → Synthesizes across all systems

Time: 30 seconds (vs. five to ten minutes searching manually).



The results

Alec: “Any tools we can give investors to serve themselves end up being highly adopted.”

From zero AI adoption to standard practice in 18 months. Compliance maintained (data never leaves Bessemer infrastructure). 234 hours per year reclaimed per analyst (AI scrapes blogs, they build relationships). 20 different partner workflows supported simultaneously.

Bonus: AI evaluates AI tools

“The first step of evaluating any new AI tool: Feeding their security documents into Claude. That’s helped accelerate our adoption.” Result: Tool evaluation in days (not months).

Why it works

Locally hosted Claude meets R.I.A. compliance requirements without blocking adoption. MCP integration allows queries across the entire tech stack from a single interface. Self-service design means high adoption because people get answers immediately. Most importantly, the system flexes to support 70 different workflows rather than forcing everyone into one process.

Workflow 7: 5× research capacity overnight

Research bandwidth in investing is finite. An analyst can thoroughly research two to three companies per day. This constraint determines which markets you explore, which adjacent opportunities you investigate, which hypotheses you can test. AI removes that constraint.



The problem

David Hefter, BlackRock's AI Champion for Investments (\$12T AUM), explains the research constraint: "Investing is a lot about doing research. If you're trying to manually gather 20 fields for 20 companies, it'd be quite time-consuming. With one AI prompt, you could replace what would have taken a hundred Google searches."

The bottleneck: Research bandwidth equals analyst hours available. Interesting adjacent markets go unexplored because there's no capacity.

What BlackRock built

They connected AI to comprehensive data infrastructure, including relationship intelligence from Affinity:

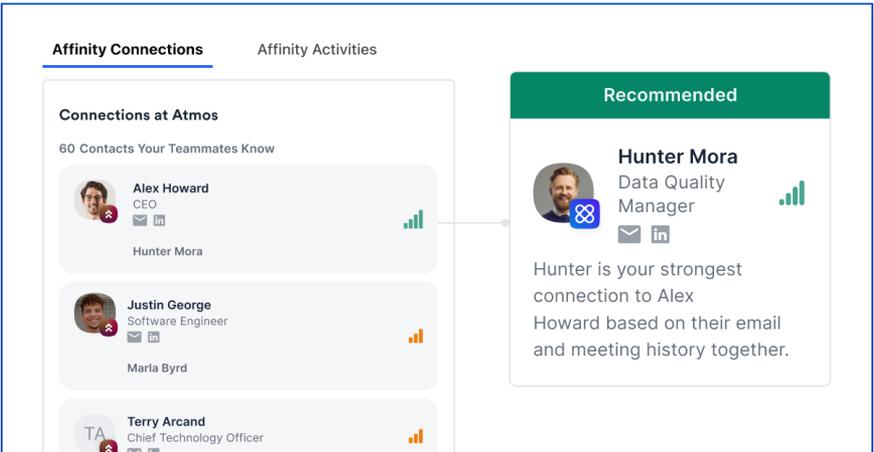
Example 1: The 20-company deep dive

Single prompt: “Research these 20 enterprise software companies. For each: revenue estimate, funding history, top three competitors, management team, customer segments, recent launches, growth trajectory.”

AI autonomously searches public web → Queries Pitchbook → Searches internal BlackRock research → Checks Affinity for relationship history → Returns all 400 data points in five to ten minutes.

David: “The quality of results are very comparable to what a human analyst would do. That alone allows us to have scale.”

Example 2: Understanding relationship dynamics



The screenshot displays the 'Affinity Connections' interface. On the left, under 'Connections at Atmos', there are three contact cards: Alex Howard (CEO), Justin George (Software Engineer), and Terry Arcand (Chief Technology Officer). Alex Howard's card is highlighted with a green bar and a green bar chart icon. On the right, a 'Recommended' panel shows a card for Hunter Mora (Data Quality Manager) with a green bar chart icon. A line connects Alex Howard's card to Hunter Mora's card. Below Hunter Mora's name, the text reads: 'Hunter is your strongest connection to Alex Howard based on their email and meeting history together.'

David: “When you connect AI to your own content—emails, calendar invites, the type of information Affinity links up to—you could better understand the relationship in its entirety. It’s helpful when prepping for a meeting or trying to understand how a company operates.”

Query: “Analyze our relationship with [Company]’s management team. Who are we closest to? Has the relationship strengthened or weakened?”

AI analyzes from Affinity: Email frequency, meeting patterns, response times, communication changes, relationship scores.

Output in two minutes: Complete relationship map. Know who to tap for reference calls. Understand relationship history. Have intelligent questions ready.

The results

David: “From an investor standpoint, the research element is significantly being augmented. We save time. We could research areas that we wouldn’t otherwise research.”

5× research throughput (10-15 companies per day vs. two to three). 15 minutes for meeting briefing (vs. one to two hours). Can explore adjacent markets (previously no bandwidth). Analyst-quality output at machine speed.

The accuracy framework

David: “A lot of people get held up thinking AI should be 100% accurate. If the old process was only getting it correct 80% of the time, then your AI threshold should be just beat that. With self-driving cars, they won’t have zero accidents, but they’ll have fewer than humans. Same idea.”

The strategic advantage

David: “If you want to be differentiated, you don’t necessarily need to build your own AI solution. The data can be applied through data connectors. With what Affinity is doing in that direction, it’s very much aligned.”

Why it works

AI handles the mechanical work of gathering and synthesizing information across multiple data sources. Humans apply judgment to the synthesized output. The combination produces analyst-quality research at 5× the speed, which fundamentally changes what the firm can investigate and how quickly they can move on opportunities.

What winners have in common

Pattern 1: Single source of truth for relationships

SpeedInvest's Lukas: “For anything when it comes to relationship intelligence, Affinity should be the source of truth—not just for deal management but for portfolio. If I want to find CTOs at our Series A companies in London, I go to Affinity.”

Notable Capital's Dave: “It's incredible to see investment and platform teams living out of Affinity every day and come to trust it as their source of truth.”

Wil's Clifford: “Everything is in one place which is in Affinity. This is important for our team—one source of truth and one place we can always go.”

The firms that win consolidate relationship data in one system. No more spreading context across email, LinkedIn, spreadsheets, and individual memory. One system, complete visibility.

Pattern 2: Automatic capture drives adoption

Bessemer's Alec: “We use technology to amplify relationships and networks—to make connections easier to find that exist within your network.”

SpeedInvest's Lucas: “All of that automated activity capture—emails, meetings, Zoom calls—can be captured via activity sync. This means manual data entry becomes a thing of the past.”

Future of Work's Udai: “We use the Outlook integration, so it's always on in the background enriching our data set. Which means we're using it frequently.”

Email and calendar sync forms the foundation. When interactions capture automatically, adoption becomes inevitable because the system delivers value without requiring data entry work.

Pattern 3: AI augments, never replaces

BlackRock's David: "In the investment and VC space, the relationships are key. You can't replace humans. The personal connection piece can't be replaced by AI."

Bessemer's Alec: "The reason Bessemer is such an established firm is not the process and technology—it's the relationships of the partners and the impressive founders we work with."

Notable's Bailey: "Relationships are access and access is everything in this industry."

AI handles research and administrative work. Humans handle relationship building and judgment. The combination is better than either alone.

Getting started

If your firm is struggling with:

Banker relationships going cold → SpeedInvest's banker coverage system

Missing proprietary deals → Gradient's 30-second relationship check

Hours wasted on meeting prep → Notable's AI prep and follow-up

CRM adoption failures → Future of Work's automatic capture approach

Manual deal categorization → Wil's AI classification system

Compliance blocking AI adoption → Bessemer's locally hosted model

Research bandwidth constraints → BlackRock's AI research workflow

The infrastructure these firms share:

- Automatic activity capture from email and calendar (zero manual entry)
- Relationship intelligence calculated from actual communication patterns
- AI and automation layered on top of clean relationship data
- Single source of truth for all relationship context

What they've achieved:

- **SpeedInvest:** 357 banker relationships managed systematically across 6 offices.

- **Notable Capital:** 500+ BD intros per year tracked by a two-person team.
- **Bessemer:** 70 investors enabled with flexible workflows, 234 hours per analyst reclaimed.
- **BlackRock:** 5× research capacity, exploring markets that previously had “no bandwidth.”
- **WIL:** 250+ hours per year saved, AI categorizing hundreds of companies automatically.
- **Future of Work:** CRM adoption that lasted beyond the typical 90-day failure point.
- **Gradient:** Winning deals in a week while competitors still getting introduced.

What they have in common:

Relationship intelligence as a competitive advantage. Systems that scale without adding headcount. Infrastructure that makes networks systematically activatable.

What's next?

Start with one:

Pick the workflow solving your biggest pain point.

Build from there.

Talk to customers:

Connect with firms already using these workflows—
Speed Invest, Notable Capital, Bessemer, BlackRock,

WiL, FOW Partners.

See these workflows in action:

Request a demo focused on your specific use case
(banker relationships, LP management, portfolio
support, AI integration).

[Talk to sales](#)

