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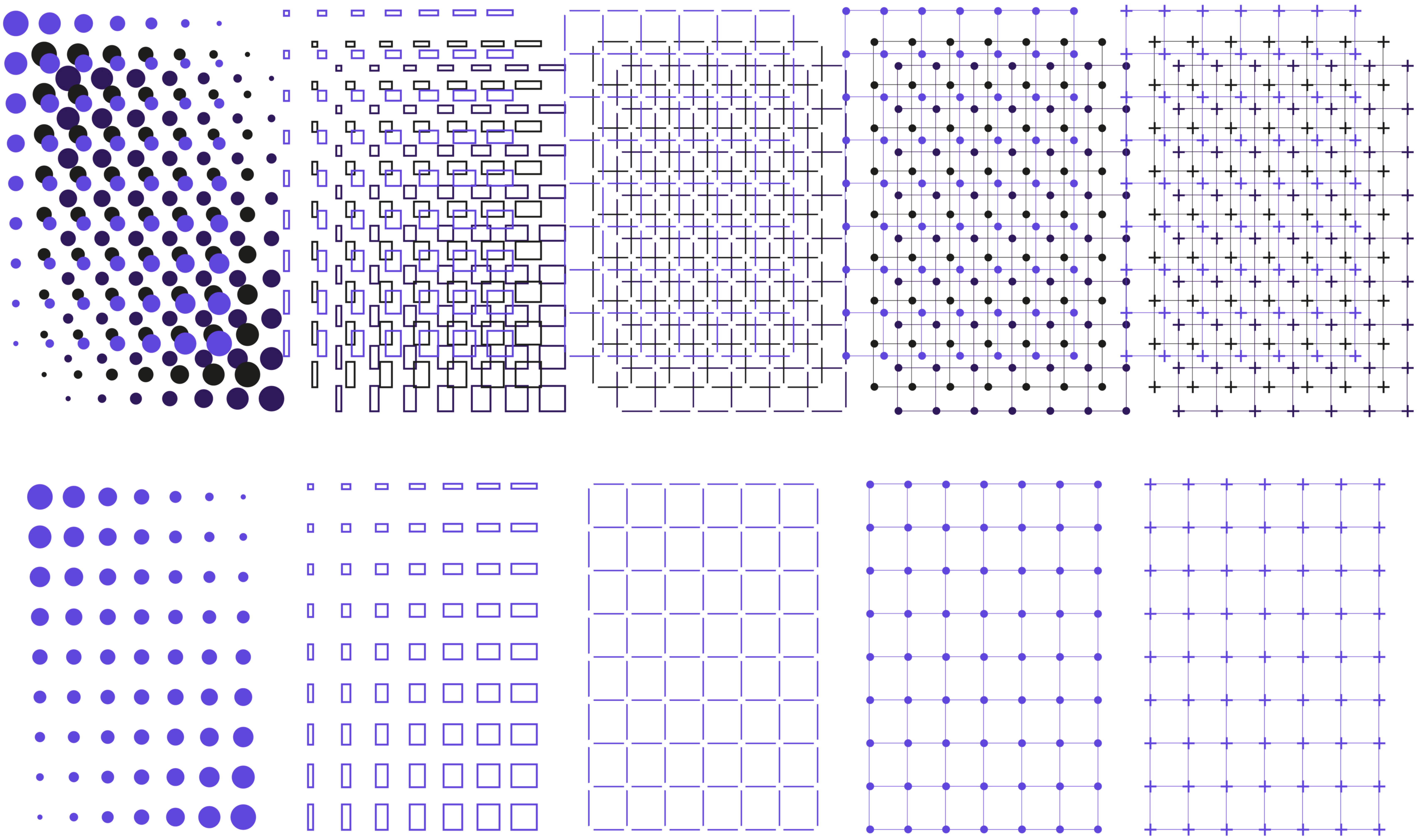


How to Build Institutional Knowledge and Improve Decision Making at Your Investment Bank

Executive Summary

Every meeting, pitch and transaction generates useful information about a firm's relationships, opportunities and deals.

Too often however, that information remains scattered across inboxes, spreadsheets, temporary trackers and individual memory, making it difficult to reuse and vulnerable when bankers leave. That's why building a firmwide practice for consistently capturing, connecting and developing institutional knowledge is so important.

Institutional knowledge is the reusable record of a firm's relationships, business development and transaction activity—the information and context it preserves so bankers can apply it again, build on prior experience and strengthen the firm's collective judgment over time. Captured consistently, connected across the business and made easy to access, that record makes the work relying on it more efficient and effective.

When firms consistently capture, connect and build on the knowledge generated through their work, bankers spend less time searching, rebuilding context and repeating work, while making decisions with a broader view of the firm's accumulated experience. As the record grows, the same data can also help firms capture and analyze key performance indicators, apply AI tools and conduct more informed strategic analysis.

In this report, you'll learn how to:

Table of Contents

1. The hidden asset inside every investment bank

Every relationship, opportunity and transaction creates a trail of useful information: who was involved, what was discussed, how the client or buyer responded, what decisions were made or how the process developed over time.

That operating record supports the work bankers do every day. It helps them prepare for meetings, manage relationships, coordinate across teams and move transactions forward without repeatedly rebuilding context from memory, email threads or scattered files.

Yet much of that information often remains difficult to discover and reuse. It may sit in personal notes, inboxes, spreadsheets or systems that capture only part of the picture.

The reusable record

Institutional knowledge is the information and context a firm preserves from its work so bankers can apply it again across relationships, opportunities and transactions.

In practice, that means capturing and maintaining a reusable record of relationship, business development and transaction data that draws from and is available to the firm as a whole—most often in a purpose-built CRM.

That record can include:

- Relationship histories and meeting notes
- Client preferences and prior discussions
- Opportunity and pitch history
- Buyer feedback and pass reasons
- Transaction activity, decisions and outcomes
- Selected operating data and lessons when available

The value often comes from making that data easily accessible and interconnected. A contact record is more useful when it shows prior discussions and related opportunities. Buyer feedback is more useful when it's tied to the transaction and stage where it was given. An opportunity history is more useful when bankers can see how the conversation developed and why it advanced, stalled or ended.

Knowledge becomes institutional when useful information remains available to the firm as a whole well after the meeting ends, the deal team changes or the original banker moves on.

That requires capturing information within normal workflows and storing it where bankers can find and reuse it without reconstructing the history from memory, email threads or scattered files.

The immediate gains are practical: faster preparation, cleaner handoffs, more reliable follow-up and less time spent searching or re-explaining. Over time, consistent records can also support reporting, selected KPIs and broader strategy.

2. Why valuable knowledge gets lost and what it costs the firm

Valuable knowledge often stays with the bankers and deal teams who generated it. A senior banker may hold years of context on clients, buyers and referral sources, while deal teams accumulate important information about opportunities, transaction processes, buyer behavior, decisions and outcomes.

Much of that knowledge is useful beyond the immediate relationship or deal, but it often remains tied to the individuals who were closest to the work.

Some of that history may exist in emails, notes, spreadsheets, trackers or CRM records, but not in a form the rest of the firm can easily access, connect or reuse.

That creates friction when another banker needs to prepare for a meeting, understand how an opportunity developed, review prior buyer activity or pick up a transaction without rebuilding the context from scratch. It creates an even larger risk when bankers leave and years of accumulated knowledge leave with them.

Another major reason valuable information gets lost is more practical: capturing it often requires too much effort from bankers in the first place. When bankers have to enter the same information more than once, update systems outside their normal workflows or work with data entry tools that weren't designed for investment banking, the shared record becomes inconsistent and incomplete—if one is created at all. As a result, bankers fall back on personal files and informal communication instead of contributing to a central repository for relationship, opportunity and transaction information. Without a platform to organize and connect that information appropriately, it becomes less accessible and less reusable for the firm as a whole.

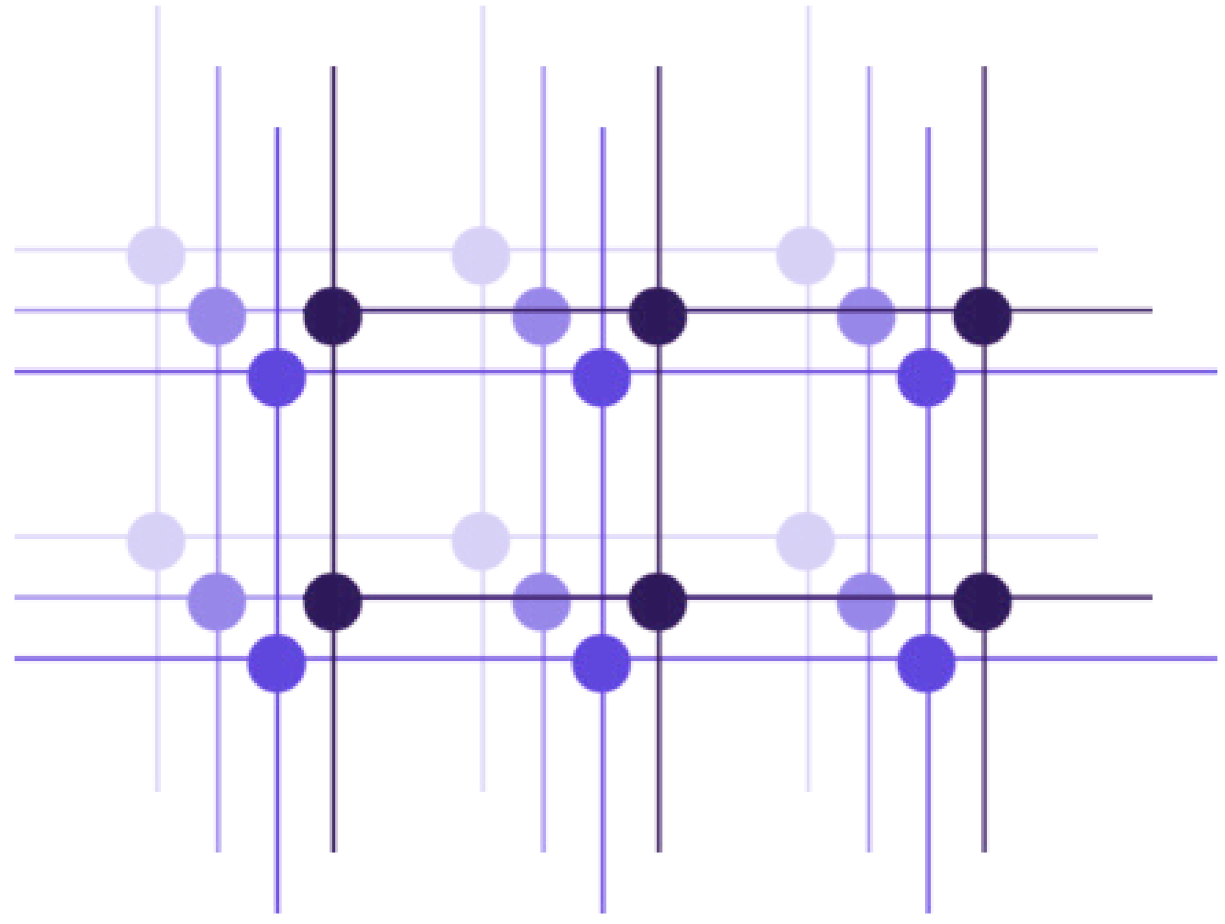
04

Knowledge loss rarely causes one dramatic failure. More often, it creates small inefficiencies, delays and missed connections that compound across the firm.

A banker spends an extra hour reconstructing a relationship history before a call. A deal team rebuilds a buyer list without the context captured during a similar transaction. A routine update turns into a search across emails, spreadsheets and old materials at the worst possible time.

None of these problems looks decisive on its own. Repeated across bankers and transactions, however, they can create a meaningful drag on productivity, execution and client service.

When prior information isn't accessible, bankers have to rebuild it. That may mean searching old email threads, recreating contact lists or asking colleagues to explain the history of a relationship or process. Junior bankers spend more time gathering information while senior bankers spend more time answering questions the firm should already be able to answer.



When that information isn't preserved in a usable form, firms also lose the ability to learn from prior work. Bankers may repeat avoidable mistakes, miss patterns in buyer behavior or overlook lessons from earlier pitches and transactions that could improve business development and execution. Over time, the firm keeps generating experience without getting the full benefit of what it has already learned.

At the same time, when relationship and transaction history remains concentrated with a few bankers, the firm becomes more dependent on their availability and continued presence. That creates friction during normal collaboration and a much larger risk when a banker leaves. Years of context may become difficult to recover, weakening relationships and forcing others to rebuild knowledge the firm once had.

3. Capturing the information that matters

Information becomes reusable when it's recorded consistently, connected to the right relationships, opportunities and transactions and stored where bankers can find it while doing the work that depends on it.

In a CRM, that means logging meetings, notes and activity against the relevant contact, firm and opportunity, using shared stages, statuses and categories across the firm. Institutionalizing knowledge doesn't mean recording every conversation or saving every document. Firms should focus on the information bankers are likely to need again across relationships, opportunities and transactions.

Relationship and communication history

A contact record should include enough context to help a banker understand the relationship and act on it.

That can include:

- Which bankers know the contact and how well
- Prior meetings, calls and introductions
- Relevant notes from important conversations
- Client, buyer or investor preferences
- Sector, geography and transaction criteria
- Current priorities and changes in role or firm
- Related opportunities, pitches and deals
- When the information was collected

The goal isn't to log every exchange. It's to preserve the context another banker or team—or you—may need before reaching out, preparing for a meeting or involving that contact in a process.

Transaction execution

Most deal teams already track the core mechanics of a live process, including buyers considered, meetings, bids, milestones, etc. Preserving that record consistently and connecting it to the relevant buyers and relationships gives the firm a usable transaction history.

Where available, teams should also capture the context behind important developments:

- Notable buyer feedback or pass reasons
- Client decisions that changed timing, positioning or outreach
- Major shifts in interest or momentum
- Why certain buyers were added, prioritized or removed
- Brief post-process observations on what worked or didn't

A short note on a major decision, unusual response or meaningful change can make the formal process data far more useful later. Future bankers—or the same team months later—can see not only what happened, but the context that shaped the process.

Lessons and operating data

Some value emerges across multiple relationships and transactions. Consistent operating data—such as stage changes, milestone dates, buyer activity and final outcomes—can support reporting, selected KPIs and comparisons over time. Teams may also capture occasional observations about recurring delays, unclear handoffs or process changes that worked well. These lessons won't always be available and don't need to become a formal postmortem.

When they are clear and specific, however, preserving them can help future teams improve execution.

Building the record

With a CRM purpose-built for investment banking, bankers can capture this operational data directly in the same system they use to manage relationships, opportunities and deals. In MadeMarket, that includes defined fields, dropdown menus, activity categories, opportunity stages, deal milestones, target lists and other workflow tools that give bankers a consistent place to update information as relationships, opportunities and transactions develop. Firms can also create custom fields when they want to capture something more specific—for example, a standardized field for every pitch that records why an opportunity didn't advance, using a defined set of reasons that can later be analyzed across the firm. Notes and documents provide the place to capture the information that doesn't fit into a standard field. Meeting notes can be attached to the relevant contact or firm, buyer feedback can be tied to the specific target or deal and pitch notes or supporting documents can be stored with the opportunity or transaction they relate to.

4. How institutional knowledge improves decision making

When firms capture and organize useful information well, the clearest benefit is immediate: bankers can find what they need faster, avoid rebuilding context and spend less time searching through emails, spreadsheets and old files.

Over time, the same record can also improve decision making. Bankers aren't limited to what they remember from the last conversation or the deals they personally worked on. They can draw on a broader history of relationships, opportunities and transactions across the firm. That can shape decisions in practical ways. A banker may see prior buyer feedback that changes how a company is positioned, recognize a relationship that could strengthen an opportunity or enter a client meeting with context that leads the conversation in a more productive direction. A deal team can compare the current process with similar transactions and make a better call about outreach, timing or strategy.

As that record grows—clean, connected, consistent and preserved across bankers and teams—the firm's knowledge compounds, strengthening judgment over time rather than resetting with each new opportunity or departure. That's how the operating record becomes institutional knowledge. It makes the work that depends on this information faster today, strengthens the foundation for better judgment over time and creates the data foundation for more advanced analytics.

Once relationship, opportunity and transaction data has been captured consistently over time, firms can measure parts of the business that are difficult to evaluate reliably from memory, scattered files or final deal outcomes alone.

KPIs built from institutional knowledge

Business development conversion is one example. By tracking opportunities consistently from initial outreach or pitch through signed mandate, firms can measure conversion rates across the funnel and see where opportunities tend to stall or drop out. The same data can also be compared by banker, team, sector, transaction type or source to show where conversion is stronger or weaker.

Milestone timing provides a similar view into deal execution. Consistent dates for steps such as NDA execution, CIM distribution, management meetings, bids and diligence allow firms to measure how long processes take between meaningful points. Over time, that can reveal recurring bottlenecks, differences between teams or transaction types and places where execution may be improved.

The same operating history can also make win and close rates more useful. Rather than looking only at the firm's overall results, leadership can compare outcomes across bankers, teams, sectors, opportunity types or other relevant categories and evaluate those results alongside the activity that led to them. Where firms also track staffing and project assignments, they can begin evaluating workload alongside output. Leadership can see which bankers or teams are carrying heavier workloads, where resources may be underused and whether differences in staffing help explain differences in execution or results. These analyses give leadership a fuller basis for reviewing how the firm originates business, manages relationships and executes transactions. They can also surface differences between what the firm assumes and what its own operating history shows.

Learn more: Investment Banking KPIs for People and Teams: What to Track and How

Asking questions through AI

AI extends that analysis beyond predefined KPIs and reports. Once firms are consistently capturing the underlying data, bankers can use AI to ask more specific questions across that history and combine multiple data points that would otherwise require manual analysis.

09

Building on that information repository, a CRM like MadeMarket can securely connect CRM data to AI platforms like Claude or ChatGPT, allowing bankers to ask questions across that data such as:

- Which sponsors progressed beyond management meetings on comparable healthcare services deals?
- Which buyers passed because of customer concentration but later engaged with similar businesses?
- Which active opportunities have remained in the same stage for more than 60 days?
- Which important relationships depend primarily on one banker?
- What buyer concerns recur across industrial services transactions below a certain size?
- What's the full history of this client relationship, including prior pitches, meetings and mandates?

This makes a larger body of firmwide information practical to use without requiring bankers to know where every record, note or field is stored.

Though it's important to note that the quality of the answers still depends on the quality of the record. Missing relationship history, inconsistent stages and disconnected transaction data limit what analytics and AI can produce.

Clean, connected information supports a progression from faster access to better analysis and eventually to strategic questions that draw on the firm's accumulated experience.

Learn more: How Investment Bankers Can Use AI to Get More from Their Data

5. Technology as the firm's knowledge infrastructure

A good CRM gives firms a central place to capture, organize and connect the relationship, opportunity and transaction information that builds institutional knowledge.

MadeMarket is the only CRM and deal management platform built exclusively for investment bankers, bringing relationship management, business development and transaction execution into one connected system.

Because those tools are built around investment banking workflows, maintaining the record also makes the immediate work faster. **Bankers on MadeMarket can update their tracking logs 12X faster**, making it easier to capture operational data about relationships, opportunities and transactions consistently.

From there, MadeMarket gives the firm a shared source of truth for its relationships, opportunities and transactions, bringing information contributed by bankers and deal teams across the organization into one accessible record.

That means a banker preparing for a meeting or working through a live deal doesn't have to track down a colleague at two in the morning to find out the latest update—the information is already there and available to everyone who needs it.

Advanced search tools and filters built around investment banking data make it easier to find that information quickly, whether a banker is looking for a relationship history, a prior opportunity, a buyer's activity on a deal or the latest status of a transaction.

MadeMarket can also connect with many of the tools where firms already generate and collect information, from email platforms to Salesforce and PitchBook, ensuring that useful data from across the firm's existing tech stack can flow into and remain connected with the broader relationship, opportunity and transaction record.

Together, these capabilities help firms turn information that would otherwise be fragmented, temporary or dependent on individual bankers into a durable institutional asset. Over time, that gives the firm a deeper base of knowledge to draw from—improving execution today while strengthening decision-making, analytics and AI as the record grows.

Depending on the size of their teams, firm's that switch to MadeMarket see on average a 3000% return on their investment.

Use our ROI Calculator to find out what kind of return your form can generate with MadeMarket.

Calculate ROI

ROI

3,876%

Hours saved per year

37,500

Additional revenue per year

$19,000,000

Want to learn more about the relationship between better dealmaking and better data? Read How to Close More Deals with Better Data as an Investment Banker.

And—to learn more and explore what MadeMarket can do for you, connect with a member of our team to get started with a demo!