

## CASE STUDY

# Shaping the Future of Fund Finance with Knox Lane

How Knox Lane and Maybern are creating the future of fund management through deep collaboration and product innovation.

What happens when a forward-thinking investment firm partners with a technology company to build the fund management platform of the future? Knox Lane, a tech-savvy private equity firm, joined forces with Maybern's product team for an intensive two-day collaboration

## BY THE NUMBERS

**2 Days**of Intensive  
Collaboration**6**

Working Sessions

**3+**New Product  
Features**10+**Innovation  
Opportunities Identified

## Knox Lane: Beyond Traditional Fund Finance

Led by CFO Ivor van Esch, Knox Lane represents a new generation of investment managers who view technology as a strategic advantage, not just an operational necessity.

"I want my team to be proactive strategic decision-makers, not just reactive to data requests," explains van Esch. This vision drives everything from performance reporting that unlocks new insights to scenario modeling that directly informs the firm's financial strategy.

Knox Lane has built a sophisticated tech stack combining Chronograph for portfolio management, AI-powered research tools, and now Maybern for integrated fund operations and intelligence. Knox Lane actively partners with technology companies to shape product development.

Van Esch recognized that Maybern could unlock new levels of analysis and insights for his team. "Maybern has spent time making sure the math works, now we can use that to enable more interesting insights and visualizations."

To bring that vision to life, Maybern's product team joined the Knox Lane team on-site in San Francisco for a two-day product innovation workshop.

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IVOR VAN ESCH  
CFO, KNOX LANE

## Collaboration in Action

The two teams worked side-by-side to reimagine what fund operations could look like:



### Live Prototype Testing

Maybern brought working prototypes of scenario modeling and hybrid waterfall features. Knox Lane's team provided immediate feedback that led to design iterations in real time.



### Workflow Shadowing

Maybern observed Knox Lane's actual operations: from quarterly IRR bridge calculations to investor reporting workflows. This revealed how manual, time-intensive processes can be replaced with system automation in the future.



### Data Mapping

Together, both teams analyzed Knox Lane's technology ecosystem to identify integration opportunities for seamless data flow and unified workflows.



### Whiteboard Innovation Sessions

Teams collaborated on whiteboard sessions to envision a more intelligent future of fund operations, identifying opportunities for AI integration, advanced analytics and configurable insight dashboards, and operational automation.

## New Features, Shaped by Real Use Cases

The workshop went beyond addressing immediate needs, uncovering new product opportunities.

### → Dynamic Scenario Modeling (New Product)

Working with Knox Lane revealed opportunities to reimagine scenario modeling. Their feedback shaped a streamlined approach that transforms quarterly planning from spreadsheet marathons into strategic conversations. They also highlighted the value of being able to create different versions of the fund model based on changes in assumptions and compare performance outputs.

### → Maybern Intelligence Layer (AI Integration)

The group brainstormed intelligent features including automated insights with key performance callouts, a Maybern modeling agent to suggest hypothetical scenarios and compare projected performance, and a Maybern reporting agent that frees finance teams from routine requests.

### → IR Self-Service Dashboards (New User Experience)

Recognizing that investor relations teams have different data needs than controllers, the teams designed dashboards with charts, insights, and digestible metrics. This empowers better LP communications while freeing finance teams from manual IR data requests.

### → Integrated Performance Reporting (Workflow Automation)

The team gathered blueprints for performance metrics to be implemented with MXL – the Maybern Execution Language – for automated calculations, transforming a time-intensive manual process into real-time insights that support strategic decision-making.

## Real Impact for Both Partners

### KNOX-LANE

- Future access to cutting-edge scenario modeling capabilities perfectly suited to their streamlined portfolio
- Direct influence on product development ensures features solve their actual problems
- Pathway to operational transformation through purpose-built technology rather than forced adaptation to rigid software
- Enhanced team capabilities through tools designed around their strategic vision

### maybern

- Deep insights from sophisticated users who identify real-world opportunities
- Product validation and refinement through intensive feedback from forward-thinking practitioners
- Co-creation partnerships resulting in innovations neither team could have developed in isolation
- Roadmap guidance from users who understand both current limitations and future possibilities

## From Collaboration to Implementation

The partnership continues with a clear roadmap for bringing these innovations to life over the coming quarters:

# 1

### Scenario Modeling Beta

Knox Lane will be among the first to test the new scenario modeling capabilities, perfect for their streamlined portfolio and forward-thinking approach. Real-world usage will drive final feature refinements.

# 2

### MXL Performance Engine

Implementation of Knox Lane's IRR bridge calculations and financial highlights calculations using Maybern's configurable calculation engine, automating their most time-intensive quarterly processes.

# 3

### AI Integration Launch

Rolling out intelligent features including automated insights and natural language queries based on the vision developed during the collaboration.

## READY TO SHAPE THE FUTURE?

Join the ranks of forward-thinking fund managers who are co-creating the next generation of fund operations technology. Whether you want to improve existing processes or pioneer entirely new approaches, we're ready to collaborate.