

Top 10

Agentic Use Cases in VC

A practical guide to getting started with agentic workflows in Venture Capital

Fund Co. ☆

Open organizations x +

Collaborators

Owners	Score	Notes
Guillem Sagué	90	Competitors...
Guillem Sagué	80	Competitors...
Guillem Sagué	70	Competitors...
Guillem Sagué	70	Competitors...
Guillem Sagué	70	Competitors...
Guillem Sagué	70	Competitors...
Guillem Sagué	60	Competitors...
Guillem Sagué	60	Competitors...
Guillem Sagué	60	Competitors...

sessionID: "cbread_dv8H0dYfP3MUC09J210Jg",
message: "find all competitors of Most",
preMessageID: "",
sessionID: "",
messages: {
 id: createdAt
 role: message
}

Missed rounds ☆

Views All organizations x Open organizations x +

All organizations 95 organizations Collaborators

Name	Notes	Last Funding On
Qbeast Analytics qbeast.io	- Does the ...	8/4/2025
Quarero Robotics quareroRobotics.com	- Does the ...	7/30/2025
handwave.eu handwave.eu	- Does the ...	8/1/2025
Tracelight tracelight.ai	- Does the ...	8/7/2025
Trustfull.com trustfull.com	- Does the ...	7/26/2025
TACEO taceo.io	- Does the ...	7/31/2025
Due opendue.com	- Does the ...	7/30/2025
Spaceflux spaceflux.io	- Does the ...	7/24/2025
Keabank keabank.com	- Does the ...	7/23/2025

FluoretiQ
fluoretiq.com

Overview Connections Introductions Notes Reminders

Notes

- Section - Market:

- Market Size: The global diagnostic testing market is expected to reach USD 109.92 billion by 2029, with a CAGR of 3% (<https://www.precedenceresearch.com/diagnostic-testing-market>). The diagnostic testing market is expected to grow from USD 264.17 billion in 2024 to USD 1,099.92 billion by 2029, with a CAGR of 3% (<https://www.databridgemarketresearch.com/reports/global-diagnostic-testing-market>).
- Market Growth: The diagnostic testing market is expected to grow from USD 264.17 billion in 2024 to USD 1,099.92 billion by 2029, with a CAGR of 3% (<https://www.precedenceresearch.com/diagnostic-testing-market>).
- Customer Segments: Major segments in the health diagnostics market include pharmaceutical companies, research institutions, and public health laboratories for high-volume testing, government and academic research, and supporting drug development.
- Trends and Macroeconomic Factors: Key trends include the rise of point-of-care testing, genomic testing, and the rise of point-of-care testing, catering to the increasing demand for personalized medicine (<https://www.sphericsdiagnostics.com>).
- Laws and Regulations: The health diagnostics market is heavily regulated, with stringent requirements for accuracy and safety.

or ☆

Open organizations x +

Collaborators

# LinkedIn Em	# Total F	Aa Reasons for pas
68	37,788,073	We did not fully und
863	340,000,000	Underestimated the
1178	375,565,230	We underestimated
49	2,782,712	Did not fully unders
282	25,219,528	Investment commit
1007	299,948,723	Bias against venture
1810	1,213,056,722	Did not appreciate
209	168,964,492	We were too slow to
7	2,810,000	—

Short-list Radar ☆

Views All organizations x +

All organizations 8 organizations Collaborators

Name	Date to Re-Engage	Aa Reason
Cognigy cognigy.com	12/31/2025	Secondary Opp.
FlixBus flixbus.com	7/31/2025	Secondary Opp.
sennder sennder.com	5/31/2025	6 months before expect
deepset deepset.ai	12/31/2025	6 months before expect
Factorial factorialhr.com	12/31/2025	Secondary Opp.
Usercentrics usercentrics.com	12/15/2024	Growing quicker than e
CoachHub coachhub.com	6/30/2025	6 months before expect
Qdrant qdrant.tech	12/15/2024	Growing quicker than e

IriusRisk
iriusrisk.com +1 other

Overview Connections Introductions Notes R

Notes

IriusRisk

Deal Summary

Overview

IriusRisk was founded on July 26, 2015, by Stephen Nouri, a cybersecurity expert and founder of security modeling platform that integrates into the software development lifecycle. It serves industries such as financial services, healthcare, and government, with significant investment from Sequoia Capital and others (<https://www.iriusrisk.com>).

Product

IriusRisk is an automated threat modeling platform that facilitates collaboration between security teams and developers, ensuring that security is built into applications from the start. IriusRisk's approach is adaptable, whether organizations are looking for a quick win or a long-term solution. IriusRisk's value proposition lies in its ability to automate threat modeling, integration with existing security tools, and regulatory and industry standards. IriusRisk's value proposition lies in its ability to automate threat modeling, integration with existing security tools, and regulatory and industry standards.

Introduction

Venture capital firms are increasingly adopting agentic AI to automate research, streamline workflows, and enhance decision-making. By empowering teams to focus on strategy rather than manual tasks, agentic AI unlocks new levels of efficiency and insight. The following ten use cases illustrate how agentic AI is transforming the way VC firms operate and compete.

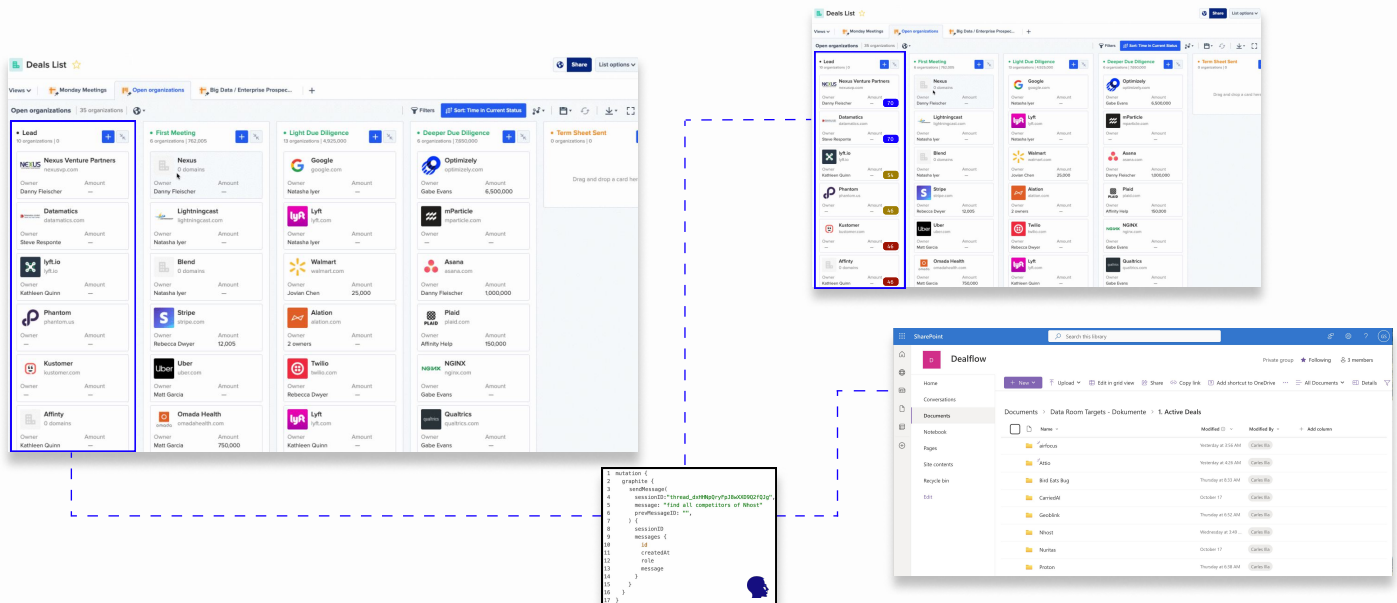


Fig. 1. The AI connects to the existing systems of the VC, such as Affinity and Sharepoint and executes the workflows autonomously.

1. Qualification and Scoring

Deal Scoring and Qualification enables investors to quickly identify and prioritize the most promising opportunities by combining self-reported startup data with external data sources. The AI evaluates each company across dimensions including team strength, traction, market potential, and strategic fit to generate a dynamics core.

Data Sources: Self-reported data (deck, business plan), employee data, social, private databases (e.g. Crunchbase), public data.

Pro tip: Avoid applying hard criteria when deal information is incomplete, as this can cause you to overlook promising opportunities. In early stages, rely more on soft criteria to rank the deals instead of filtering them out.

2. Data Enrichment and Research

Automated CRM enrichment performed by an Agent is a quick win for any organization. It allows the firm to dramatically expand the data it captures without increasing the team's workload.

Data Sources: Self-reported data (deck, business plan, etc), private databases, public data.

Pro tip: CRM enrichment is a stepping stone to build a solid and rich knowledge base that will enable the VC firm to implement and train AI models in the future.

3. Deal Flow Origination / Active Sourcing

Active Sourcing enables the AI to autonomously search for new investment opportunities and add them directly to the CRM. Each opportunity is then automatically enriched with relevant company data, key contacts, and contextual insights, making it ready for review and further processing by the team. It can be combined with other workflows such like scoring or enrichment.

Data Sources: Company databases, social, public data, product discovery sites, code repositories.

Pro tip: Active Sourcing is particularly effective when combined with Deal Scoring (see Use Case #1). When searching for new deals, the Agent can focus on the highest-scoring opportunities to maximize the ROI of the workflow.

4. Watchlist & Smart Reminders

This workflow lets the VC track selected companies or thematic targets. The AI continuously monitors them for growth signals such as funding rounds, key hires, or major news. When relevant activity is detected, it triggers Smart Reminders to notify the responsible team members. This keeps the firm proactively informed and enables faster, more targeted engagement.

Data Sources: News, employee data, self-reported data (deck, business Plan), CRM data.

Pro tip: Ensure you have a clear and efficient deal processing in place before activating this AI workflow. Once Smart Reminders are enabled, your team will start receiving a higher volume of alerts, which can quickly increase their workload if not managed effectively.

5. Competitive Intelligence

This workflow lets the VC monitor the competitive landscape and analyze what the direct competitors are investing in, where their deals are being sourced and how their investments would fit in the investment strategy.

Data Sources: News, blogs, portfolio sites, company databases, social, public data.

Pro tip: Focusing on a small set of the closest competitors enables firms to dive deeper into competitive dynamics, both qualitatively and quantitatively, and extract valuable actionable insights from their analysis.

6. Document Automation in Sharepoint / GDrive

Document Automation streamlines file management across SharePoint and Google Drive while strengthening the firm's knowledge base. For example, when a new deal is created in the CRM, the system automatically generates the required folders and subfolders and files documents in the correct locations. ESG and investment checklists update dynamically as new data becomes available, and custom automations further optimize deal flow and collaboration.

Data Sources: CRM data, documents

Pro tip: By enabling automated email sync in the Affinity CRM the agent can gain access to all email attachments received by the team and automatically file the documents to SharePoint or Google Drive.

7. Anti-Portfolio Monitoring

The AI monitors deals that the VC has passed on to track their subsequent performance. If a company reaches a significant milestone, such as achieving a

specific growth rate or completing a new funding round, the VC is notified and the AI conducts an analysis to identify the root causes of the missed opportunity.

Data Sources: Company databases, social, public data, news, employee data, CRM data.

Pro tip: Always record clear and structured “pass reasons” in the CRM, such as competition, slow growth or timing not right. Standardized tags help the firms understand their own decision-making patterns and compare them against future outcomes. Over time, this reveals biases or blind spots.

8. Taxonomy Classification

The AI captures how the VC firm defines sectors and stages, classifying deals and assigning tags according to the firm’s unique taxonomy. It does so by analyzing the nature of each company’s business and products and categorizing them accordingly.

Data Sources: Self-reported data, company sites, company databases, social, public data.

Pro tip: Be as specific as possible and include real life examples of your firm’s taxonomy. This helps the AI learn faster and produce more accurate results.

9. Tracking Missed Deals

The VC sets the AI to screen funding rounds that would have been eligible for investment but were never seen. This is done by verifying that the deal never entered the firm’s CRM. The exercise helps the firm identify white spots in its dealflow coverage, continuously improve its sourcing activities, and strengthen its network.

Data Sources: Company databases, social, public data, news, employee data, CRM data.

Pro tip: Narrow the search to targets that best align with the firm's strategy and have the AI conduct an in depth analysis of them. By focusing on a smaller set of the most relevant companies, firms can explore more deeply and uncover actionable insights.

10. Thesis Development and Foresight Analysis

AI enables venture firms to spot emerging technologies, market shifts, and new investment themes early. By analyzing vast amounts of unstructured data, it can detect weak signals and hidden trends that humans might overlook.

Data Sources: Research papers, news outlets, social platforms, and market analyses

Pro tip: Feed identified themes into sourcing workflows so the AI can proactively scout startups aligned with new theses.

Other Relevant Use Cases

Other relevant use cases are **ESG and impact analysis**, **portfolio monitoring** and performance prediction, and **warm intro mapping**. AI enables firms to track portfolio performance in real time, identify early signs of growth or risk, and assess ESG impact using diverse data sources. It also maps the strongest introduction paths between founders, investors, and partners to enhance collaboration and deal flow.

About CarriedAI

We are a team of former VCs with engineering backgrounds with the vision to transform the investment management industry. We believe that AI will not only optimize existing processes but also reshape the architecture of investment firms and alter how capital is allocated in private markets.

At CarriedAI, we are developing a suite of AI agents to support institutional investors in their work. Our agents perform investment analysis at 20 times the speed of human teams with greater accuracy so that the humans have more time to do what they do best: Build meaningful relationships with founders.

Our goal is to empower our clients to reimagine their investment firms from the ground up, integrating AI into their operations. We aim to provide a comprehensive suite of AI-Agents with orchestration and monitoring tools that can map any industry-specific capital allocation process and where investment strategies can be encoded and executed by AI.

Sincerely,

Guillem Sagué, PhD
CEO