Streamlining deal processing with AI for an impact investment firm

Client overview

Our client is a forward-thinking impact investment firm committed to providing top-tier financial returns while addressing some of the world's most pressing environmental challenges.

The firm's unique approach involves identifying and investing in deals that not only offer strong financial returns but also contribute significantly to environmental sustainability.

Challenge

As the firm grew, the volume of inbound deal opportunities increased exponentially. The manual process of sorting, evaluating, and progressing deals became a bottleneck, consuming valuable time that could be better spent on high-impact activities.

Our client sought a solution that could streamline the initial administrative and assessment tasks, particularly the initial processing and progression of deal opportunities, without compromising the quality of their investment decisions.

Objective

The goal was to develop an AI-powered system that could automate the processing of inbound deal emails, assess their alignment with the client's investment criteria, and manage the progression of suitable deals through predefined deal screens.

The solution needed to integrate seamlessly with our client's existing Google Cloud infrastructure and provide an intuitive interface for the investment team.

Solution | Technology stack

OpenAI

Utilized for natural language processing (NLP) and generating customized email drafts.

Google Cloud APIs

Employed for integrating with Google Sheets, Google Drive, and handling email interactions.

Laravel Nova

Served as the administration panel for managing the AI system and deal progression workflows.

Stage 1: Automating inbound deal processing

Email parsing with NLP

We used OpenAI's GPT models to parse incoming deal emails, extracting key information such as deal type, industry focus, and environmental impact.

Automated email drafting

Based on the assessment, the system automatically drafted decline or request emails using OpenAI's text generation capabilities. These drafts were then queued for review by the investment team.

Suitability assessment

The system leveraged OpenAI's NLP capabilities to evaluate whether the deal aligned with the client's environmental impact investment focus.

Project tracking infrastructure

If a deal was deemed suitable, the system automatically created a structured deal folder on Google Drive using Google Cloud APIs.

Stage 2: Streamlining deal progression

Deal Screens integration

The system automatically copied predefined Deal Screens into the newly created deal folder. These screens included the Impact Screen and Mandate Screen, which were essential for evaluating the potential investment.

Deal summary management

A summary of each deal's status was automatically updated in a Google Sheets Deal Summary document, providing the team with real-time insights into the deal pipeline.

Information extraction and population

The AI system extracted relevant data from the pitch deck, email chains, and online sources to populate the Deal Screens. Traceability to source data was maintained throughout the process, ensuring transparency.

AI-assisted query resolution

The system was designed to answer questions from the client's team based on the information in the Deal Summary sheet. It also facilitated the logging of instructions for next steps.

User interface and integration

Laravel Nova was chosen as the admin panel for its robust features and ease of integration. It allowed the team to review AI-generated email drafts, monitor deal progression, and make manual adjustments when necessary.

The system was fully integrated with Google Cloud, ensuring smooth data flow between the AI models, Google Sheets, and Google Drive.

Results

Increased efficiency

The AI-powered system reduced the time spent on processing inbound deal emails by 75%. The investment team could now focus more on evaluating high-potential deals rather than administrative tasks.

Improved transparency

The automated population of Deal Screens and real-time updates to the Deal Summary sheet provided the team with complete visibility into the deal pipeline, facilitating better decision-making.

Enhanced accuracy

By leveraging OpenAI's advanced NLP capabilities, the system accurately assessed the alignment of deals with client's investment focus, resulting in more targeted and relevant deal opportunities.

Scalability

The integration with Google Cloud and the use of Laravel Nova ensured that the system could scale as the client's deal volume continued to grow, without requiring significant additional resources.

Conclusion

The implementation of an AI-powered system using OpenAI, Google Cloud APIs, and Laravel Nova significantly streamlined the client's deal processing workflows. The solution not only saved time and resources but also enhanced the quality of deal evaluations, aligning with client's mission to make impactful and profitable investments.

This case study demonstrates the potential of AI to transform the administrative functions of investment firms, allowing them to focus on their core mission of driving positive change.

Next steps

Building on this success, our client plans to explore further enhancements to the system, including the integration of predictive analytics for deal outcomes and expanding AI capabilities to support post-investment monitoring and reporting.

Lessons learned

Importance of clear requirements and alignment with business goals

Lesson: a thorough understanding of the client's business goals and processes is essential for designing a solution that aligns with their needs. In this project, early collaboration with the client's team to refine requirements ensured that the AI system was tailored to their specific investment criteria and operational workflow.

Outcome: the result was a system that seamlessly integrated into existing processes, enhancing efficiency without requiring major changes to how the team worked.

Balancing automation with human oversight

Lesson: while AI can significantly streamline processes, human oversight remains crucial, particularly in industries like impact investing where nuanced judgment is often required. The decision to allow the investment team to review AI-generated email drafts and make manual adjustments was key to maintaining the quality and integrity of communications.

Outcome: this approach prevented potential errors and ensured that the firm's reputation for personalized, thoughtful engagement was preserved.

Integration challenges with existing systems

Lesson: integrating new AI technologies with existing platforms like Google Cloud and Laravel Nova can present challenges, particularly in terms of data flow and API limitations. Early identification of these challenges and proactive problem-solving were critical to the project's success.

Outcome: by addressing integration issues early in the project, we avoided significant delays and ensured a smooth deployment.

Scalability and future-proofing

Lesson: building systems with scalability in mind is essential, especially for growing firms. The decision to use Google Cloud and Laravel Nova, which are both highly scalable platforms, meant that the system could grow alongside client's increasing deal volume without requiring extensive rework.

Outcome: this foresight allowed the client to continue expanding its operations confidently, knowing the system could handle future growth.

Data security and compliance

Lesson: data security is paramount when dealing with sensitive investment information. Implementing robust security measures, particularly around the storage and transmission of data between AI models and Google Cloud services, was a key focus throughout the project.

Outcome: by prioritizing data security, we ensured that the client could maintain compliance with relevant regulations and protect sensitive client and deal information.

Training and user adoption

Lesson: even the most advanced AI systems require effective training and support to ensure user adoption. Providing comprehensive training sessions and ongoing support helped the client's team adapt to the new system and maximize its potential.

Outcome: high user adoption rates were achieved, with team members quickly embracing the new tools and workflows, leading to immediate productivity gains.

Continuous improvement

Lesson: AI systems benefit from continuous monitoring and improvement. Throughout the project, we established feedback loops with the client's team to identify areas for enhancement and refine the AI models based on real-world use cases.

Outcome: this iterative approach allowed us to fine-tune the system post-deployment, ensuring it continued to meet client's evolving needs and delivered sustained value.

Team composition

Project Manager	Business Analyst	UI/UX Designer
Full Stack Developer	AI Specialist	Quality Assurance Engineer
		DevOps

Contact information

To coordinate next steps please contact:

Mail: contact@2fort.com

Tel: +1 202 9602900

LinkedIn: 2fort-group

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