# Enterprise VC/PE Platform PRD 2.0

## 1. Deal Sourcing & Pipeline Management

### 1.1 Automated Deal Sourcing

- Integration with major data providers:
- PitchBook, CB Insights, Crunchbase for company data
- Capital IQ, FactSet, Refinitiv for market data
- RelSci, ZoomInfo for contact data
- AI-powered company discovery using Gemini 2.0:
- Pattern recognition across successful exits
- Market trend analysis
- Competitive landscape mapping
- Growth signals detection
- Patent and IP analysis
- Team strength evaluation

### 1.2 Deal Flow Management

- Custom deal scoring models
- Stage-based pipeline tracking
- Team collaboration tools
- Automated follow-up system
- Meeting notes with AI summaries
- Due diligence checklist automation

## 2. Financial Analysis & Modeling

### 2.1 Advanced Financial Modeling

- Custom model templates for different industries
- Scenario analysis engine
- Sensitivity analysis tools
- Comparables analysis automation
- Exit modeling
- Waterfall analysis
- Returns attribution

### 2.2 AI-Enhanced Analysis

- Automated financial statement analysis
- Anomaly detection
- Growth pattern recognition
- Market sizing automation
- Competitive analysis
- Risk factor identification

## 3. Portfolio Management

### 3.1 Portfolio Monitoring

- Real-time KPI tracking

- Custom metric dashboards
- Automated reporting
- Board meeting management
- Resource allocation optimization
- Exit timing analysis

### 3.2 Value Creation
- AI-powered growth opportunities identification
- Customer lead generation
- Partnership recommendations
- Operational improvement tracking
- Synergy analysis between portfolio companies

## 4. Market Intelligence
### 4.1 Market Analysis
- Real-time market monitoring
- Competitor tracking
- Industry trend analysis
- Regulatory change monitoring
- Patent tracking
- Research paper analysis

### 4.2 AI-Powered Insights
- Market sentiment analysis
- Growth prediction
- Disruption potential assessment
- Technology adoption curves
- Regulatory impact prediction

## 5. Investor Relations & Reporting
### 5.1 LP Portal
- Custom LP dashboards
- Automated reporting
- Document management
- Capital call management
- Distribution tracking
- Performance attribution

### 5.2 Presentation & Deck Management
- Google Slides integration
- Template management
- Version control
- Real-time collaboration
- Automated updates
- Brand consistency checking

## 6. Due Diligence

### 6.1 Automated Due Diligence

- Document collection & analysis
- Background checks
- Legal compliance checking
- IP analysis
- Customer reference automation
- Vendor assessment

### 6.2 AI-Enhanced DD

- Red flag detection
- Pattern recognition
- Fraud detection
- Market validation
- Team assessment
- Culture analysis

## 7. Risk Management

### 7.1 Risk Analysis

- Market risk assessment
- Technology risk evaluation
- Team risk assessment
- Competition analysis
- Regulatory risk tracking
- Operational risk monitoring

### 7.2 AI-Powered Risk Insights

- Early warning system
- Risk correlation analysis
- Mitigation recommendation
- Exposure monitoring
- Scenario planning

Would you like me to start implementing any specific part of this system? I recommend we begin with either:

1. Fixing the current issues (login system, navigation buttons)
2. Implementing the enhanced deal sourcing system
3. Building out the advanced financial modeling capabilities
4. Creating the AI-powered analysis engine

### VC Platform PRD - Version 1.0

- **1. Core Platform Features**
- **1.1 Authentication & User Management**
- Professional authentication system with:
- Multi-factor authentication

- Role-based access (Partners, Associates, Analysts, Portfolio Companies)
- SSO integration with Google Workspace
- Team collaboration features
- Activity logging and audit trails
- **1.2 Deal Flow Management**
- Deal pipeline tracking
- Automated deal sourcing from:
- AngelList, Crunchbase, PitchBook integration
- LinkedIn company monitoring
- Startup event/accelerator tracking
- Deal scoring and prioritization
- Custom deal stages workflow
- Automated company research compilation
- Meeting notes and follow-up tracking
- **1.3 Financial Analysis & Modeling**
- Advanced financial modeling tools:
- Revenue modeling (multiple scenarios)
- Burn rate analysis
- Cap table management
- Valuation modeling
- Exit scenario analysis
- Portfolio performance tracking
- Integration with Excel for complex models
- Real-time market data integration
- Benchmarking against industry standards
- Custom metric tracking
- **1.4 Risk Assessment (Enhanced)**
- Comprehensive risk analysis:
- Market risk assessment
- Technology risk evaluation
- Team assessment
- Competition analysis
- Regulatory risk tracking
- AI-powered risk scoring
- Historical performance correlation
- Industry-specific risk factors
- Real-time market condition monitoring
- **1.5 Due Diligence Management**
- Due diligence checklist automation
- Document collection and management
- Automated background checks
- Patent and IP analysis

- Market size validation
- Competitor analysis automation
- Technical due diligence framework
- Legal compliance checking
- **1.6 Portfolio Management**
- Portfolio company dashboard
- KPI tracking and reporting
- Resource allocation optimization
- Portfolio company health monitoring
- Automated reporting generation
- Board meeting management
- Strategic planning tools
- Exit planning and tracking
- **1.7 Pitch Deck & Presentation Management**
- Google Slides integration
- Template management
- Real-time collaboration
- Version control
- Automated deck analytics
- Presentation scheduling
- Feedback collection
- Brand consistency checking
- **1.8 Lead Generation & Business Development**
- For Portfolio Companies:
- Customer lead generation
- Market opportunity identification
- Partnership recommendation engine
- Sales pipeline tracking
- Marketing campaign management
- ROI tracking
- For VC Firm:
- Deal flow lead generation
- Network expansion tools
- Event recommendation engine
- Relationship mapping
- Automated follow-ups
- **1.9 Market Intelligence**
- Real-time market monitoring
- Competitor tracking
- Industry trend analysis
- News and social media monitoring
- Patent and research paper tracking

- Market size estimation
- Growth rate prediction
- Regulatory change monitoring
- **1.10 Reporting & Analytics**
- Custom report builder
- Automated LP reporting
- Portfolio performance analytics
- Investment thesis tracking
- Return attribution analysis
- Risk exposure reporting
- Deal flow analytics
- Team performance metrics
- **2. Technical Requirements**
- **2.1 Integrations**
- Financial Data: Bloomberg, Thomson Reuters
- Market Data: CB Insights, PitchBook
- CRM: Salesforce, HubSpot
- Communication: Slack, Email
- Document Management: Google Drive, Dropbox
- Analytics: Tableau, PowerBI
- Productivity: Google Workspace, Microsoft Office
- Banking: Major financial institutions
- **2.2 Security**
- SOC 2 compliance
- End-to-end encryption
- Regular security audits
- Access control management
- Data backup and recovery
- Compliance monitoring
- **2.3 Performance**
- Real-time data processing
- Fast search and filtering
- Mobile responsiveness
- Offline capabilities
- API rate limiting
- Load balancing
- **3. User Experience**
- **3.1 Interface**
- Modern, professional design
- Customizable dashboards
- Intuitive navigation
- Mobile-first approach

- Dark/light mode
- Accessibility compliance
- **3.2 Workflow Automation**
- Email automation
- Meeting scheduling
- Document generation
- Data entry automation
- Task management
- Notification system

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