

## Data Sources/Platforms:

- Google Workspace (Free)
- Hubspot (Free)
- AngelList (Free)
- Crunchbase (Free)
- Pitchbook (Paid)

## User Persona: Investor at small-mid sized VC fund

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## One-Page Core Interface

### Main Screen Layout (one single page):

- **Left Sidebar:** chats + projects + integrations
- **Top Bar:** search across tools, quick actions
- **Center Workspace:** AI copilot chat + outputs

## Sidebar Structure (ChatGPT-style, but VC-optimized)

### Sections:

1. **New Chat**
  - Starts a blank AI session
  - Defaults to a general-purpose chat unless user assigns a project
2. **Search Bar (Chats & Projects)**
  - Searches across all conversations, documents, and integrated data
  - Example: “find my memo draft on the Series A fintech deal”
3. **Projects (Core Feature)**
  - Each project is a “workspace” for an investment, workflow, or sector
  - Chats are automatically added to specific project folders based on their fit
  - Examples:
    - *Fintech Investment – Project*
    - *Portfolio Monitoring – Q1*

- *Generative AI Sector Research*
- *Fundraising Prep / LP Updates*

#### 4. Integrations Panel (Clickable Icons)

- HubSpot
- Google Workspace
- Angellist
- Crunchbase
- PitchBook
- Others later: Notion, Airtable, Salesforce, DocSend, Carta

#### Integration Flow:

- User clicks **HubSpot icon** → opens login/auth screen → upon login, returns to CoreFlow → icon now marked as "Connected"
  - Same flow for all tools
  - Integrated data instantly becomes queryable in chat
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## Core Chat Interface - The Copilot

#### Chat operates like ChatGPT with VC-specific enhancements:

- Natural language questions ("summarize deal pipeline")
- Live search indicator ("Searching HubSpot... Searching Google Drive...")
- Cited responses using integrated datasets
- Clickable citation links to source data
  - e.g., "Deal sourced from HubSpot → View Record"

#### Examples of How It Behaves:

- Ask:  
"Give me the key metrics for the last 5 companies we added in CRM."  
It will:
  - Query HubSpot → fetch recent deals
  - Summarize in a table
  - Cite each source
  - Provide links to HubSpot records
- Ask:  
"Draft a deal memo for this Series A investment using everything we've



**discussed in this project.”**

It will:

- Pull all chats + files from that project
- Format a VC-style memo
- Run analyses from integrated data
- Cite data sources

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## **Project Intelligence Layer (similar to projects in chat GPT)**

Each project has its own **memory and knowledge graph** built from:

- All chats inside the project
- All integrated CRM/data sources
- All uploaded files (PDFs, decks, models)
- Notes, summaries, and insights

The copilot can reference this entire dataset automatically without re-uploading or copy-pasting.

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