

# Discovery Call Preparation: Eugene K. Owusu - AMA Capital

**Call Date:** December 1, 2024 **Client:** Eugene K. Owusu **Company:** AMA Capital / Owusu Capital Partners  
**Location:** Berlin, Germany **Email:** [owusu@amacptl.com](mailto:owusu@amacptl.com)

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## Client Profile

### Company

**AMA Capital / Owusu Capital Partners** - Berlin, Germany

### Role

Managing Director & Founder

### Business Type

**Commercial Real Estate Debt Advisory** - NOT a retail financial advisor

### Background

- Former Finance Head at BWFD (German real estate firm)
- 17+ years in financial industry
- Trained at Frankfurt School of Finance & Management
- €150M+ in financing volume structured and arranged
- GRI Institute Committee Member (Credit Opportunities & Real Estate)

### Services Offered

1. **Financing Consultation** - Analyzing clients' financial situations, recommending financing structures (debt capital, mezzanine, whole loans, preferred equity)
2. **Financing Brokerage** - Connecting developers with banks and capital providers, negotiating terms, guiding through application to contract signing
3. **Financing Optimization** - Refinancing, converting short-term to long-term financing, improving LTV ratios and interest conditions

### Target Clients

- German real estate developers
- Property companies seeking acquisition/development financing
- Clients needing refinancing, portfolio financing, or modernization capital

### Market Context

Founded to help German developers access capital amid **dwindling bank LTC (Loan-to-Cost) ratios** - addressing tightening lending standards in German commercial real estate.

### Sources

- [ReCapital News](#)
- [Owusu Capital Partners](#)
- [GRI Institute Profile](#)
- [LinkedIn](#)

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## Key Workflow Implications

Given Eugene's business model, his workflows likely involve:

Workflow Stage	Key Activities	Tools Likely Used
Deal Sourcing	Networking, referrals, inbound inquiries	Pipedrive, Aircall, Google Mail
Initial Consultation	Discovery calls, needs assessment	Aircall, Fireflies, Google Meet/Teams
Due Diligence	Financial analysis, document review	ChatGPT/Perplexity, Dropbox, Notability
Lender Matching	Capital provider outreach, term sheet negotiation	Pipedrive, Aircall, Gmail
Deal Structuring	Presentations, proposals	Gamma, Dropbox
Closing	Documentation, contract management	Dropbox, Google Mail
Ongoing Relationship	Client updates, refinancing opportunities	Pipedrive, Motion

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## Platform Summary & API Capabilities

### 1. Pipedrive (CRM) - Central Hub

**What it does:** Sales CRM for managing leads, deals, contacts, and pipeline visualization.

**API & Integrations:**

- Full REST API included with all plans
- 400+ native integrations via marketplace
- Zapier integration (6,000+ apps)
- Webhooks for real-time events
- Native integrations with Aircall, Fireflies, Google Workspace

**Key for finance:** Contact management, deal tracking, activity logging, email sync

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### 2. Aircall (VoIP Phone System)

**What it does:** Cloud-based phone system with call recording, routing, and analytics.

**API & Integrations:**

- Open API for custom integrations
- 80+ native CRM integrations
- **Native Pipedrive integration** - auto-logs calls, recordings, notes
- Call data syncs automatically with CRM
- Click-to-call from CRM

**Key stats:** Reduces manual entry by ~75% (per user reviews)

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### **3. Fireflies.ai (Meeting Transcription)**

**What it does:** AI-powered meeting recording, transcription, and note-taking.

#### **API & Integrations:**

- GraphQL API for transcript retrieval
- **Native Pipedrive integration** - auto-logs transcripts to contacts
- Joins Zoom, Google Meet, MS Teams, Webex
- Action item extraction, sentiment analysis
- MCP Server for AI tools (Claude, ChatGPT)

**Finance-specific note:** Generic tools like Fireflies are popular but finance-specific tools (Jump, Zocks) score higher in advisor satisfaction per Kitces Research.

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### **4. Motion AI (Calendar/Task Management)**

**What it does:** AI-powered calendar that auto-schedules tasks based on priorities and deadlines.

#### **API & Integrations:**

- API available for task/project management
- Integrates with: Google Calendar, Outlook, iCloud
- Video: Zoom, Teams, Google Meet
- Zapier for 7,000+ apps
- Email-to-task forwarding

**Limitation:** Primarily Zapier-dependent for integrations; ~\$19/month

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### **5. ChatGPT with Custom GPTs / Perplexity**

#### **What they do:**

- ChatGPT: Conversational AI, custom GPTs for specific workflows
- Perplexity: AI-powered research with real-time web search, citation tracking

#### **API & Integrations:**

- OpenAI API (ChatGPT): Full API, Zapier/Make integration
- Perplexity API: Sonar models, RAG pipelines, upcoming SEC filing integration
- Both integrate via Zapier, Make, n8n

**Note:** Custom GPT Actions deprecated in 2024; recommend AI agents (Lindy, etc.) or Zapier for external connections

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### **6. Google Mail/Meet**

**What it does:** Email and video conferencing in Google Workspace.

#### **API & Integrations:**

- Gmail API, Google Meet REST API
  - Deep Pipedrive integration (email sync, calendar, video links)
  - Meeting transcription/recording available
  - Zapier, Make, native CRM integrations
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## 7. Dropbox (Cloud Storage)

**What it does:** Cloud file storage and sharing.

### API & Integrations:

- Full API: File Properties, File Requests, Sharing API
- Business API for team/admin functions
- Integrates with: Zapier, Make, n8n
- Pipedrive can store documents via Dropbox links

**Consideration:** May overlap with Google Drive if using Google Workspace

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## 8. Microsoft Teams

**What it does:** Chat, video meetings, collaboration hub.

### API & Integrations:

- Microsoft Graph APIs
- Contact center integrations available
- CRM integrations via third-party connectors
- Fireflies can join Teams meetings

**Potential overlap:** With Google Meet and Aircall for communication

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## 9. Notability (iPad Note-Taking)

**What it does:** Handwritten/typed note-taking app for Apple devices.

### Integrations:

- iCloud sync (Apple devices only)
- NEW: Notability Cloud with web app access
- Export to: Dropbox, Google Drive, OneDrive
- Export formats: PDF, RTF, .note
- **No API** - manual export only

**Key limitation:** Siloed from other systems; requires manual transfer

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## 10. Gamma (Presentations)

**What it does:** AI-powered presentation creation.

### API & Integrations:

- API v1.0 (GA as of Nov 2025) - included with Pro plan
- Zapier, Make, n8n integration
- Import from: Google Docs/Slides, Word, PowerPoint
- Export to: PDF, PNG, PowerPoint, Google Slides

## Integration Matrix

Tool	Pipedrive	Aircall	Fireflies	Google	Dropbox	Teams
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Pipedrive	-	Native	Native	Native	Zapier	Zapier
Aircall	Native	-	Native	Limited	-	Limited
Fireflies	Native	Native	-	Native	-	Native
Motion	Zapier	-	-	Native	-	Native
ChatGPT/Perplexity	Zapier	-	-	Zapier	Zapier	-
Google	Native	Limited	Native	-	Native	-
Dropbox	Zapier	-	-	Native	-	Native
MS Teams	Zapier	Limited	Native	-	Native	-
Notability	Manual	-	-	Export	Export	-
Gamma	-	-	-	Native	-	-

## Identified Redundancies & Overlaps

### Communication Tools Overlap

- **Google Meet + MS Teams + Aircall** = 3 communication platforms
- Questions to ask: Which is primary for client calls? Internal vs external use?

### Note-Taking Redundancy

- **Fireflies** (automated transcription) vs **Notability** (manual notes)
- Fireflies can auto-capture meeting content; Notability is manual
- Consider: Is Notability for personal reference while Fireflies handles official records?

### Cloud Storage

- **Dropbox** vs **Google Drive** (comes with Google Workspace)
- May be maintaining two cloud storage systems unnecessarily

### AI Research Tools

- **ChatGPT** vs **Perplexity** - both serve research purposes
- Perplexity better for real-time research with citations
- ChatGPT better for custom workflows and content generation

## Top Automation Opportunities (Tailored for Debt Advisory)

### High-Impact Automations (Quick Wins)

#### 1. Call → CRM → Notes Pipeline

```
Aircall call with developer/lender ends →
Auto-log to Pipedrive deal/contact →
Fireflies transcript attached →
Action items extracted →
Follow-up tasks created in Motion
```

Most of this works natively. Verify current integration status.

## 2. New Deal Intake Automation

```
New developer inquiry (form/email/call) →  
Create Pipedrive deal + contact →  
Create Dropbox folder structure:  
/[Client Name]/  
/Due Diligence/  
/Financials/  
/Lender Submissions/  
/Term Sheets/  
→ Send document request checklist email →  
Schedule discovery call via Motion
```

## 3. Developer Meeting Prep

```
Calendar event triggers (30 min before) →  
Pull deal info from Pipedrive →  
Pull recent documents from Dropbox →  
Generate prep brief via ChatGPT →  
Deliver to inbox
```

## 4. Post-Meeting Follow-up (Client or Lender)

```
Fireflies meeting ends →  
AI extracts: key terms discussed, action items, next steps →  
Draft follow-up email for review →  
Create tasks in Motion/Pipedrive →  
Log summary to deal record
```

## Medium-Effort Automations

### 5. Lender Database & Matching

```
Maintain lender database (Google Sheets or Pipedrive custom fields):  
- LTV/LTC limits  
- Property types (resi, commercial, mixed)  
- Geography preferences  
- Min/max deal size  
- Current appetite status
```

```
When deal enters "Lender Sourcing" stage →  
Query matching lenders →  
Generate shortlist →  
Draft outreach emails
```

### 6. Deal Presentation Generation with Gamma

```
Deal reaches "Presentation" stage →  
Pull deal data from Pipedrive →  
Pull key documents from Dropbox →
```

```
Generate lender pitch deck in Gamma →  
Save to deal folder →  
Notify for review
```

## 7. Term Sheet Tracking

```
New term sheet received →  
Log to Pipedrive deal →  
Extract key terms (AI) →  
Compare against other received terms →  
Summarize for client
```

## 8. Market Research Automation with Perplexity

```
New deal onboarded →  
Perplexity researches:  
  - Developer background  
  - Property location/market  
  - Comparable transactions  
→ Summary saved to Pipedrive notes →  
Relevant findings flagged
```

## Addressing the Notability Gap

**The Problem:** Notability has no API - notes taken during calls or analysis sessions are siloed on iPad.

**Options:**

1. **Manual Workflow:** Export notes as PDF → Save to Dropbox deal folder → Link in Pipedrive
2. **iPad Shortcuts:** Create Shortcut to auto-export and upload to Dropbox
3. **Alternative Tool:** Consider switching to a connected solution:
  - **Notion** - Full API, can sync to Pipedrive/Zapier
  - **Apple Notes** - Limited but syncs to iCloud, can trigger automations
  - **GoodNotes** - Has better export options
4. **Hybrid Approach:** Use Notability for analysis, Fireflies for meeting capture

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## Potential Challenges & Considerations

### Technical Challenges

1. **Notability isolation** - No API means manual processes will remain for iPad notes
2. **MS Teams + Google Meet overlap** - May need to standardize, or accept clients dictate platform
3. **ChatGPT custom GPT limitations** - Actions deprecated in 2024; may need Zapier/Make for external connections
4. **Lender database maintenance** - Keeping lender preferences/appetite current requires ongoing effort

### Commercial Real Estate Debt Advisory Considerations

#### Data Sensitivity:

- Developer financials, project details, deal terms are highly confidential
- Lender relationships and terms are competitive intelligence

- Consider: Who has access to which automations? Data residency?

#### **German Market Specifics:**

- GDPR compliance for all data processing
- Call recording consent requirements (Germany has strict rules)
- Document retention requirements for financial advisory

#### **Relationship Business:**

- Lenders and developers value personal relationships
- Automation should support, not replace, personal touch
- Be cautious about automating client-facing communications without review

#### **Deal Complexity:**

- Each deal is unique - templates help but customization is always needed
- Term sheet comparison isn't easily automated (complex terms, conditions)
- Due diligence can't be fully automated

#### **Cost Considerations**

Tool	Pricing Model
Zapier	~\$20-50/month for professional use; scales with tasks
Make.com	Often 50-70% cheaper than Zapier for complex workflows
Native integrations	Pipedrive-Aircall-Fireflies mostly free with subscriptions
Gamma API	Included with Pro plan
Perplexity API	Pay-per-query; budget for research volume

#### **Platform Consolidation Opportunities**

Consider whether Eugene actually needs:

- **Both** Google Meet and MS Teams (likely client-driven)
- **Both** Dropbox and Google Drive (if using Google Workspace)
- **Both** ChatGPT and Perplexity (may have distinct use cases)

#### **Recommended Next Steps After Discovery Call**

1. **Map the actual workflow** - Document specific processes step-by-step
2. **Identify top 3 pain points** - Focus on highest-impact automations first
3. **Audit current integrations** - What's already connected vs. siloed?
4. **Propose pilot automation** - Start with one quick win to demonstrate value
5. **Address redundancies** - Recommend consolidation where appropriate

#### **Sources**

##### **Platform Documentation**

- [Pipedrive API](#)
- [Aircall Integrations](#)

- [Aircall-Pipedrive Integration](#)
- [Fireflies Integrations](#)
- [Fireflies-Pipedrive Integration](#)
- [Motion Integrations](#)
- [Gamma API](#)
- [Perplexity API](#)
- [Dropbox Developers](#)
- [Google Workspace APIs](#)
- [Microsoft Teams Contact Center](#)
- [Notability Cloud](#)

## Integration Platforms

- [Pipedrive + Zapier](#)
- [Fireflies + Pipedrive via Make](#)
- [ChatGPT + Zapier](#)

## Finance Industry Research

- [Kitces: AI Notetakers for Financial Advisors](#)
- [Kitces: Financial Advisor Workflows](#)
- [WealthTech Today: AI Notetakers Guide 2025](#)