VC & Tech

Will Bricker

Part 1

Transforming Venture Firms

The Problem

One Size <> Fit All

Venture Firms are bad tech customers

❄️ Every venture firm is unique (Size, Strategy, Methods, Portfolio Shape)

⏱️ Venture Capitalists are opinionated and short on time

🎨 Traditionally thought of as more of an art than science

Venture firms have bad tech options and tech stacks

The TAM for venture tech is limited
- Only top tier funds have resources
- Hard to build for every unique snowflake

(Historically) VC Tech Stacks are whack
- A few expensive and siloed options (affinity)
- Lots of providers glued together + off "platform" work

VCs are talking about using AI...

AI does not magically appear to save the day

The Good News – AI can add value to VC

LLMs can help solve many VC pain points in the investing space and beyond
- Large amounts of messy data
- LLM's capabilities for data normalization, parsing and summarization

Applying tech to investing is an established practice, and LLMs shorten the development cycle (and cost)
- Public investors would love to welcome VCs to the party

The Bad News – VCs are a long way away from using Today's AI

Venture is a distinct and complex domain - vocabulary and conventions are unique, tolerance for errors is negligible
- AI application needs to be targeted
- AI will struggle without the proper context

AI doesn't appear and add value on its own
- Without accessible quality data, AI is pretty useless
- Without supplemental tools, AI can't solve problems on its own
- Without integration, it's just going to bloat your stack and security concerns

...and it gives AI anxiety

AI requires better tech...

You need a **data** foundation before you start to use AI
- Unclear, unclean, and inaccessible data isn't going to cut it

You need **integration** with technology to enable accessibility and action

...and organizational buy-in

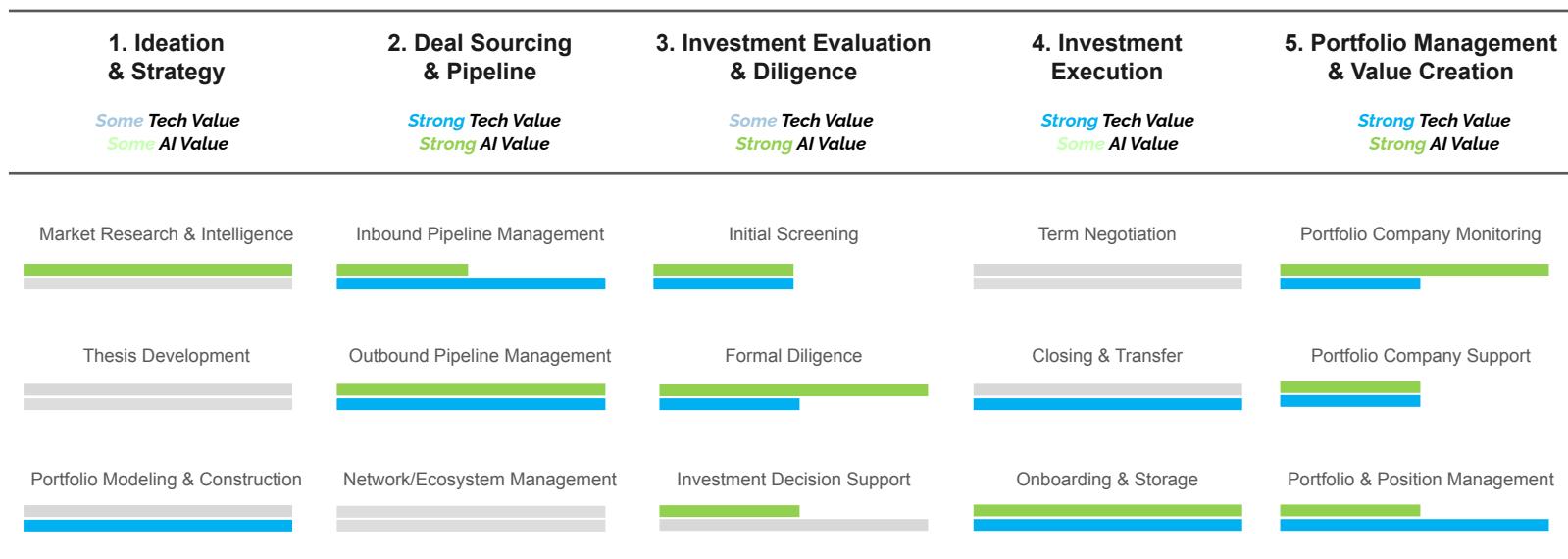The path to transformation is not linear and cannot be done in isolation

It takes time to create the foundation that unlocks value

What are the top blockers to VC's using AI?

Here are the **top blockers** I see for venture capital firms when it comes to adopting AI in their investing processes—straightforward and to the point.

1. **Data & Information Gaps**
   - AI thrives on high-quality, structured, reliable data. Many VCs lack consistent internal data (on deal flow, portfolio performance, market metrics) to feed advanced models.
   - Legacy systems, fragmented sources, and ungoverned data make integration and automation hard.
   - For VCs dealing in early-stage deals, the data may simply not exist (or be too noisy) to build meaningful predictive models.

2. **Lack of Clear Strategy and ROI Justification**
   - Using AI effectively isn't just buying a tool—it requires clear alignment with investment strategy, processes, and KPIs.
   - Many VCs struggle to demonstrate short-term payoff from AI (especially when traditional VC decision-making relies heavily on judgement, networks and "soft factors").
   - Without strong leadership buy-in and a roadmap, AI efforts can stall or be seen as ancillary rather than core.

3. **Skills, Culture & Change Management**
   - Even when the data and strategy are there, firms often don't have the internal talent (data scientists, ML engineers, AI product owners) needed to build, maintain, and interpret AI systems.
   - There can be resistance—partners, analysts, and associates may distrust AI outputs (especially ...
   - Cultural inertia: VC firms are typically small, nimble, but also heavily relationship-driven. Embed... to do.

4. **Risk, Governance & Regulatory Concerns**
   - Using AI in investing raises issues of explainability, fairness, potential bias, model drift. Especial...
   - Cybersecurity, data privacy and emerging regulation (especially for AI that touches sensitive da...
   - The predict-and-automate nature of AI may clash with the "judgement and relationships" nature...

5. **Scalability & Operational Complexity**
   - Pilots are one thing; scaling AI across sourcing, diligence, portfolio monitoring is another. Many ...
   - Costs and infrastructure (compute, model maintenance, integration with CRM/deal-flow tools) c...
   - Because VC investing is inherently probabilistic and deals are unique, building "plug-and-play" ...

WB VCs are saying they can easily start using AI. Do you agree?

Interrogated the gap between surface-level and transformative AI adoption.

No. They're confusing "easy to start" with "easy to do well."

What's actually easy:
- Signing up for ChatGPT
- Using AI to write investment memos
- Subscribing to AI-powered deal flow tools

What's hard (and what matters):
- Building workflows that consistently capture value
- Getting partners to actually change behavior
- Integrating AI into decision-making (not just documentation)
- Maintaining data hygiene for AI to be useful
- Knowing which problems AI can/can't solve

The real barriers aren't technical:
- **Cultural**: Senior partners won't defer to algorithms over intuition
- **Incentive misalignment**: Individual GP success doesn't require firm-wide efficiency
- **Data quality**: Most VCs have terrible data practices - fragmented CRMs, inconsistent tagging, no structured notes
- **Follow-through**: Requires sustained effort, not a pilot project

The tell: If it were easy, more would have done it already. The same VCs saying "we can easily adopt AI" have been saying this about data-driven investing for a decade. Few followed through.

Starting is easy. Changing how you actually invest is hard. Most VCs will dabble, not transform.

The Approach

Targeting Tech Value in VC

Not all use cases are created equal; Tech enables action (AI drive or otherwise)

AI Value
Tech Value

1. Ideation & Strategy	2. Deal Sourcing & Pipeline	3. Investment Evaluation & Diligence	4. Investment Execution	5. Portfolio Management & Value Creation
Some **Tech Value**	*Strong* **Tech Value**	*Some* **Tech Value**	*Strong* **Tech Value**	*Strong* **Tech Value**
Some **AI Value**	*Strong* **AI Value**	*Strong* **AI Value**	*Some* **AI Value**	*Strong* **AI Value**
Market Research & Intelligence	Inbound Pipeline Management	Initial Screening	Term Negotiation	Portfolio Company Monitoring
Thesis Development	Outbound Pipeline Management	Formal Diligence	Closing & Transfer	Portfolio Company Support
Portfolio Modeling & Construction	Network/Ecosystem Management	Investment Decision Support	Onboarding & Storage	Portfolio & Position Management

My Transformation Principles

🎯 Calibrate First, Build Second

Understand before you automate → define the nature of the fund and how they define value

Hypothesis-driven development → Define target state before writing code

Align on vision early → Get firm-wide buy-in on transformation approach

🚀 Vertical Slices Over Horizontal Layers

Ship working tools that solve real problems → Each sprint delivers actual value

Learn while you build → Let real usage inform your target state vision

Foundation through application → Build capabilities incrementally via practical solutions

⚡ Iteration Over Perfection

Ship fast, learn faster → Don't let perfect be the enemy of good enough

Fail fast, fail cheap → Quick experiments over big bets

AI augmentation before automation → Start with human-in-the-loop, evolve to full automation

📊 Data Foundation is Non-Negotiable

Data is the key to all paths forward → treat it like a first class priority

You can't retrofit missing data → Capture essential information from day one

Schema first, features second → Normalize data architecture before building tools

💰 Maximize ROI, Minimize Theory

Ship working tools that solve real problems → Each sprint delivers actual value

Learn while you build → Let real usage inform your target state vision

Foundation through application → Build capabilities incrementally via practical solutions

🔭 Manage the Vision

Balance near-term value with long-term foundation → Deliver wins while building for the future

Leverage AI's strengths → Don't force AI where traditional solutions work better

This is a marathon, not a sprint → Sustainable transformation over dramatic overhauls

Approach Sketch

1

Calibrate
(Weeks 1-3)

Understand Current State + Define Target Hypothesis
- **Understand the current state**: Audit existing data, tools, and workflows
- **Define value**: Identify what drives value for your investment process and portfolio support
- **Develop target state hypothesis**: required capabilities + what to build vs. buy + priority + success metrics

Deliver against specific firm value drivers while building buy-in

2

Data Core Setup
(Weeks 4-6)

Foundation You Can Retrofit Later
- **Organize**: Define MVP of Data Schema
- **Clean**: Snap to MVP on critical path data
- **Capture**: Build MVP data capture for essential information flows (deal intake, research, founder communications, portfolio updates)

Data is Critical and you can't make up missing data later

3

Vertical Slice Sprints
(Ongoing)

Deliver Value While Building Foundation
- **Target high ROI opportunities**: identify opportunities that deliver value now & help inform our target state
- **Execute quick sprints on vertical slices**: ship working tools that solve real problems and help incrementally develop and evolve foundational capabilities
- **Ops → Capability:** Start with adding operational lift, move towards transforming capability and how work is down

Learn by doing. Immediate value + long-term vision

The Application

Hustle Fund: The Challenge

High-Volume Firm

- 10-15 checks per month
- 1000 deals received monthly
- 3 funds, 400+ portfolio companies
- 700+ total transactions

Emerging Manager

- Limited resources
- Raw capabilities
- Manual processes
- No unified systems

Challenge: Build data-first investment platform from scratch to enable scale

Hustle Fund: The Solution

A rationalized and cohesive tech backbone that changed the firm's DNA

Deal Flow & Evaluation

- Automated parsing, screening, and routing for 1000+ monthly deals
- UI for centralized review and handling

50 % of deals evaluated without humans
75% reduction in response time

Portfolio Management

- Proprietary logic and data model for valuation
- Automated portfolio company update capture and proactive outreach

LIVE & centralized portfolio oversight (Fund & Portco Level)
Analysis capabilities that lead to a full strategy overhaul

Investment Execution

- Streamlined and automated transaction execution, information capture, and onboarding
- Standardized and centralized workflow and UI

60% reduction in time and tool sprawl
Full integration of data capture, doc execution & storage
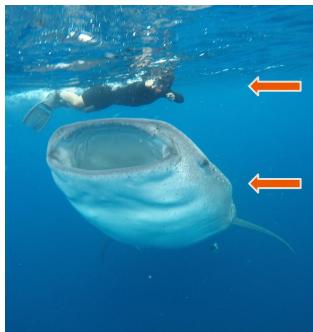
Reporting and Compliance

- Created a full "shadow admin" and unified E2E analytics
- Automated returns calculation, audit, and LP reporting

90% Reduction in quarterly and yearly admin work
Unlocked best in class market and portfolio insight

Result: better execution and enhanced capabilities across front office and back office

Part 2

Appendix

About Will

Will ←

Whale Shark ←

Education		

Employment		

Learn More

Strengths

Values
Integrity
Team first mentality
Substance over style
Learning first mentality
Impact

Abilities
Results orientation
Logical and analytical thinking
Learning on the fly

Passions

- AI, Data & Technology
- Innovating & prototyping
- Building businesses and technology
- Delivery tangible business value
- White-space & 0→1
- Solving tough challenges in fast paced environments
- Helping others

Experiences

Finance/Investing
- Investing in public and private markets, directly and via funds, buy-side and sell-side
- Investing and supporting early-stage startups
- Designing and implementing investment strategies

Business & Strategy
- Building, evolving, and overseeing business units, processes, products, and teams
- Formulating go-to-market motions and scaling sales and operations
- Managing cross-functional teams and initiatives

AI & Technology
- Designing and building AI and data-driven products for financial and non-financial applications
- Defining AI and technology transformation strategies
- Automating and augmenting manual work

Recent Work

Leading, Advising, and Building Transformational AI Initiatives

Invisible

Leadership
- Built and led AI solutions for financial services
- Member of platform steering committee and Agentic Lap

Key Projects
- PE - Agentic web tool for M&A transaction identification (think pitchbook)
- PE - RAG and Agentic RAG tool for portfolio company financial reporting extraction & normalization
- HF - Agentic RAG tool for clinical trials parsing
- VC - RAG tool for synthesizing board decks
- Other - Portfolio construction module for the first LLM-based ETF
- Other - RAG tool for lease parsing and analysis

Independent

Advisor
- "AI Receptionist" project triage and scoping
- Scoping of AI applications for radiology startup
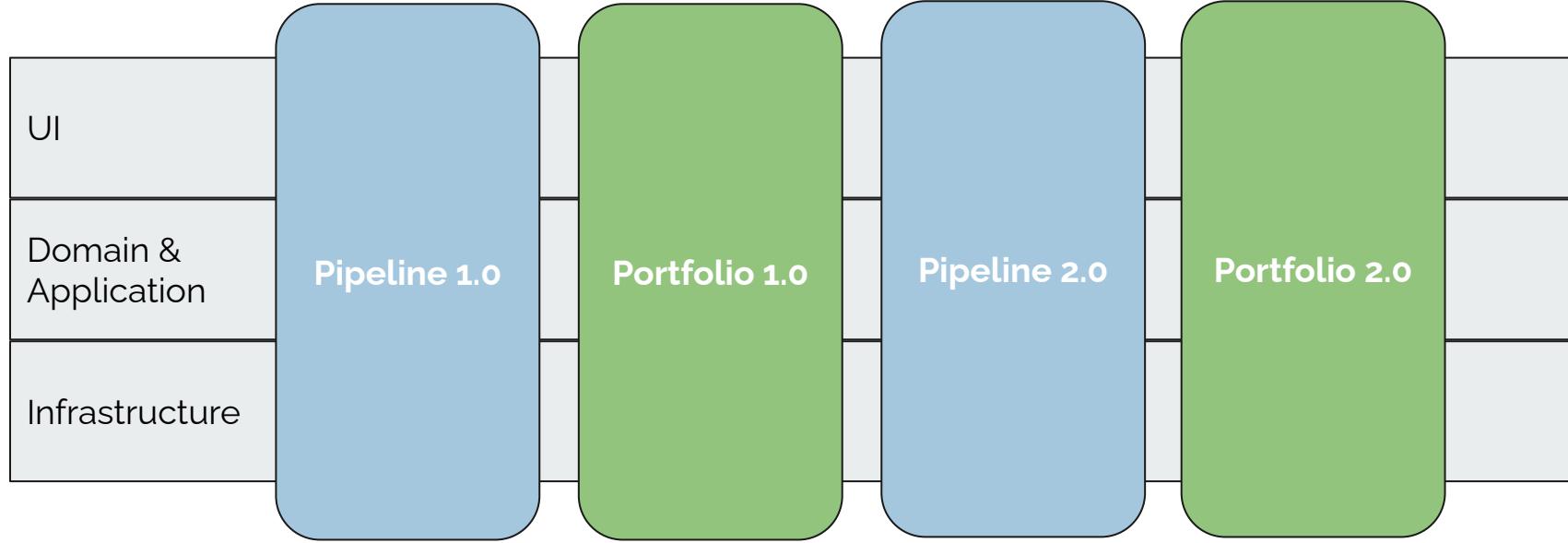- AI provider evaluation and firm AI procedures for law firm

Designing & Building
- Digital resume w/ RAG chat
- LLM transcription normalization feature
- Designed full data & domain architecture for a rech-first private market fund admin
- Open source VC Portfolio monitoring tool (WIP)
- Agentic Transcription Synthesizer (WIP

Hustle Fund Details

Hustle Fund: 0 → 1

I made innovating venture investing a priority, and prioritized vertical slices to build the platform from scratch

	Pipeline 1.0	Portfolio 1.0	Pipeline 2.0	Portfolio 2.0
UI				
Domain & Application				
Infrastructure				

Value

- Foundational infra + deal flow domain
- 20% deal flow automation
- Enabled one time deal flow analysis

- Unified portfolio & pipeline infra and domain
- 50% reduction in tracking operation costs
- Enabled live portfolio capability

- UI feature
- 50% dealflow automation
- 75% deal review time reduction
- enabled live deal dashboard

- Platform consolidation
- Reporting feature
- 75% reduction in deal execution time and platform
- 80% reduction in compliance reporting

Hustle Fund: 0 → 1

I made innovating on how to invest in venture a priority, and prioritized vertical slices to build the platform from scratch

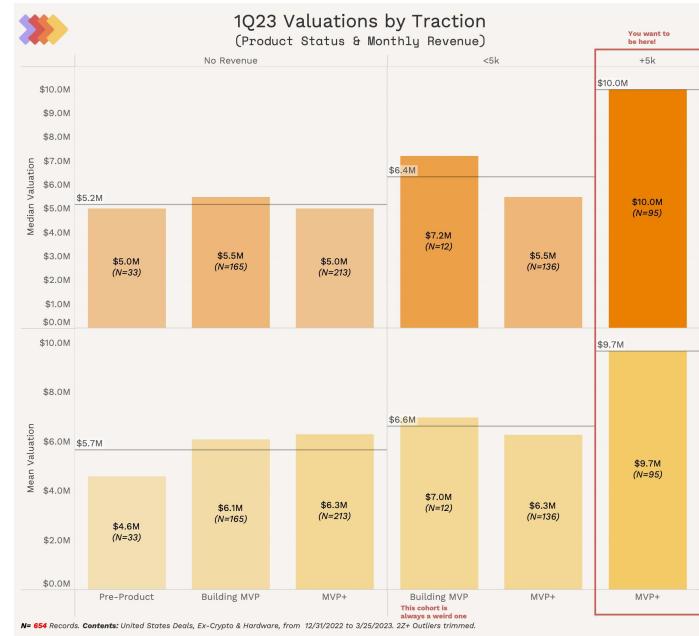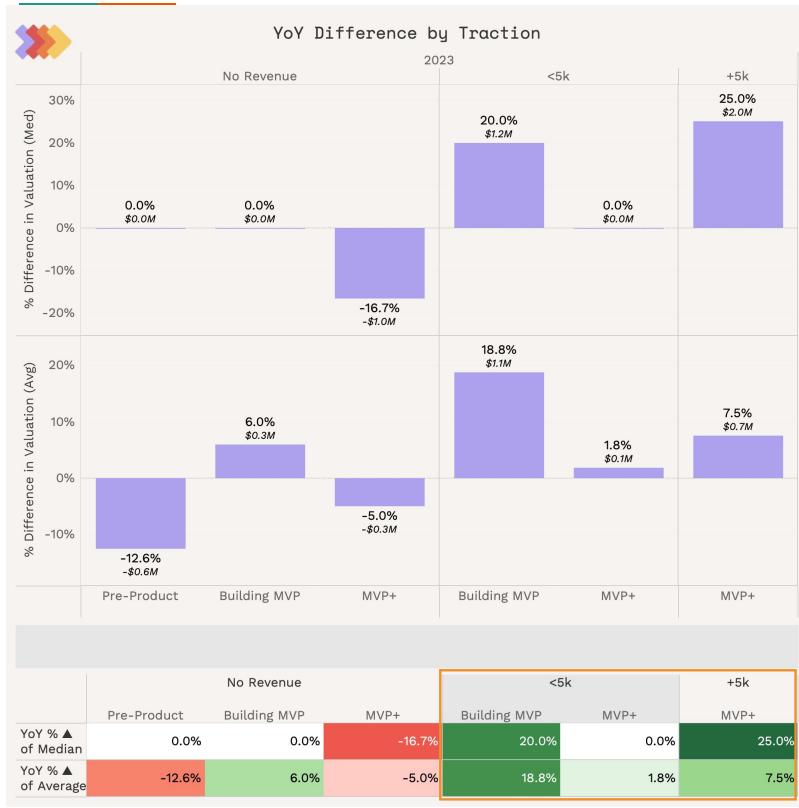|	**Dealflow 1.0** 10/2019-02/2020	**Monitoring** 01/2021-06/2021	**Dealflow 2.0** 10/2021-05/2022	**Monitoring 2.0** 10/2022-06/2023
TLDR	Built the platform foundation ; delivered operational value through automating low hanging fruit; enabled future investment value, capabilities, & insights	Expanded Foundation; delivered operational value and investment insights; enabled future investment value, capabilities, & insights	Expanded & enhanced operational value; delivered investment value via insights; enabled future investment value, capabilities, & insights	Expanded & enhanced operational value & capabilities; delivered investment value via insights; enabled future investment value, capabilities, & insights
Work	- Architected platform pieces and deal flow design - data architecture, apps, logic/automation - Enabled automation of deal resolution → Use case identification, classification, and workflows - Automated handling of easiest cases → known passes - Enabled analytics → standardized classification of startup type and traction	- Architected Portfolio Monitoring → data, logic, methods, and pipelines - Formalized Investment Execution - Rationalized investment process, Standardized execution - Standardized reporting & finance ops → returns reporting, audit reconciliation - Expanded and unified startup classification → persona, startup classification, initial investment type	- Broadened and refined 1.0 - Data schema, logic engine - Enhanced Evaluation Logic - better evaluation of known passes, new logic to prioritize deals and highlight information - Standardized Interface for deal review - Standardized dealflow insights - benchmarks, trends, etc	- Broadened and refined 1.0 - apps, data, processes - Expanded data & processes - Periodic Health Eval & performance projections; capturing & processing founder update data - Better Portco support → check-in alerts, Programmatic introductions, event notifications - Centralized Investment execution - New IC process & standards, new strategy → Performance insights & Portfolio construction model)
Value	- Data, Logic/Automation, Apps (Tech Foundation) - Automated 20% of deal flow (Ops - Accuracy & Time) - Resolution Automated (Ops - Accuracy & Time) - Enablement of analytics (Investment Insight)	- Data, Logic/Automation (Tech Foundation) - 50% reduction in investment & CFO ops via standardization (Ops - Accuracy, Ease & Time) - Enabled Accurate & Live position valuation, attribution, and analytics (Ops - Accuracy & Time); (Investment Insight)	- Viz & UI Capability; Analytics Process (Tech Foundation) - Automated 50% of deal flow (500+ deals a month) (Ops - Accuracy & Time) - Deal review time reduced by 75% (4 min to 1) (Ops - Accuracy & Time) - Enabled v1 of deal flow insights & real-time investment use (Investment Insight) (Investment Assistance)	- Easier, more accurate and quicker investment execution (1 platform, singular data entry, 75% less time) (Ops - Accuracy, Ease & Time) - Easier and better portfolio tracking and support (Automated outreach & Intros, traction benchmarks, event notifications)(Ops - Accuracy & Time), (Investment Insight) - Better strategy & Investment Decisions (Investment Assistance)

Fund Context

High Volume Firm

- 10-15 checks a month
- 1000 deals received a month
- 3 funds, with 400+ Portcos and 700+ transactions

Emerging Manager

- Few resources
- Raw Capabilities & operations

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What I've Built in Venture

	Intake	DD & Investing	Support & Monitoring	Reporting & Analytics
Data & ETL	Data Architecture (Schema, DB, ETL)			
	Automated Data Quality Checks			
	Startup Classification Taxonomy	Investment Evaluation Architecture	Health & Evaluation Taxonomy	Time Series Portfolio Value Attribution
	New Investment Ingestion	Investment Execution Taxonomy		Audit Reporting Ingestion
Logic & ALX	Automated Parsing & Evaluation	Automated Resolution & Routing	Company Update Parser	Automated Returns Reporting
	Automated Resolution & Routing	Investment Fit Predictive ALX	Auto Valuation Logic	Automated Audit Reconciliation
	Trends & Benchmarks ALX	Deal Screening & Highlight Logic	Automated Check-in & Event Alerts	Returns Analytics
	Agentic Company Research Platform	Investment Memo Generator	Board Deck Synthesizer	Valuation Change Report
		Agentic Research Processor	Startup Benchmarking	
Interface & Process	Structured Deal Intake	Historical Investment Retrieval	Live Position Value Dashboard	Audit and Admin reporting
	Customer Success (Feedback, Faq, etc)	Review UI	Portfolio Health Dashboard & Process	LP Updates & Reporting
		Follow-on/IC Process		
		Investment Execution Workflow (One stop shop for onboarding and execution)		

Examples

Example: Insights

Example: Data Architecture

PEOPLE & ENTITIES (2.X)

2.1 People
Founders & contacts

2.2 Firms
Related organizations

1.4 Investor
Investor records

CORE INVESTMENT (1.X)

1.3 Funds
Fund entities & AUM

1.2 Portfolio Companies
Portfolio companies

1.1 Investment Events
Transactions & rounds

OPERATIONS (3.X)

3.1 Portco Intake
Onboarding forms

3.2 Event Intake
New investment events

3.3 Portco Updates
Company updates

FINANCIAL (4.X)

4.1 Fund Flows
Capital movements

4.2 Fund Fees & Expenses
Management fees

Example: Startup Mapping

Startup DNA
Shape, defined by decomposing and standardizing the definition of a startup

Startup Families
Groupings of similar types of startups

| Business Model | *Who's in the value chain* |

| Product Type | *How value is delivered* |

| Industry Cluster | *Where it plays* |

| Monetization Method | *How value is captured* |

SAAS
[X]-S-[X]-S+

Enterprise SAAS
B-S-[X]-S+

Open Source Tools
B-S-D-U+

B-S-P-S =
B2B-Software-Enterprise-Subscription

Maturity
X-axis, Years since inception

Traction
Y-axis, Gross profit

Instead of stage or capital

Instead of revenue along
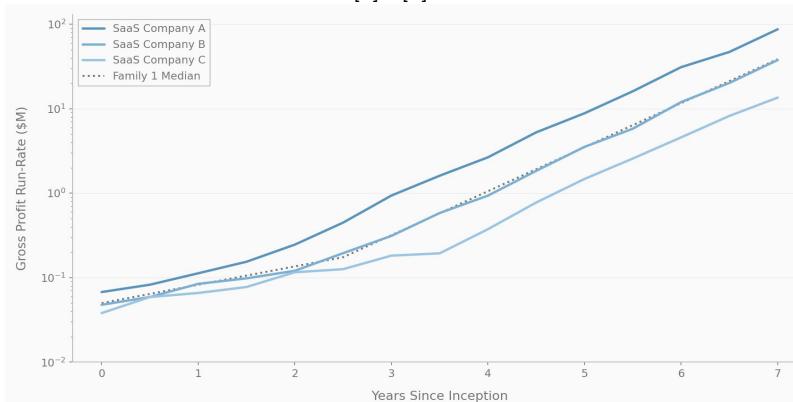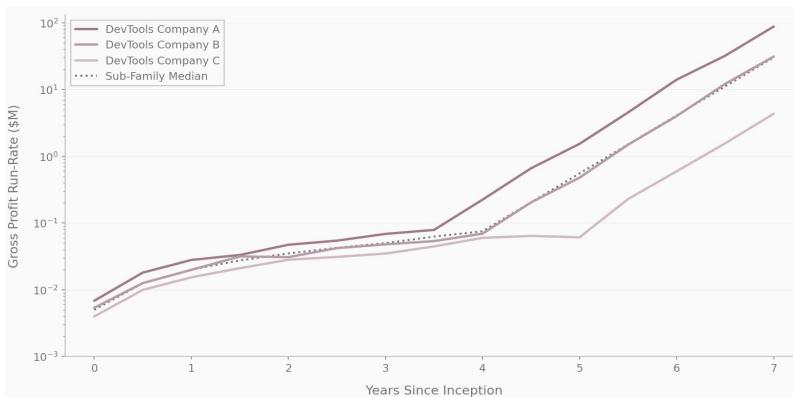
SAAS
[X]-S-[X]-S/U

Open Source Tools
B-S-D-U+

Building Concepts

The Value of Data

Data is the foundation for the application of all technology

Why you need good data

Humans are **bad at remembering things** —>
Data **helps you remember.**

Investing is an iterative process —> Data
helps you **review and analyze** what you have
done.

Humans are imperfect operators (inaccurate,
expensive)—> Data enables **Automation & AI**
capabilities

What data you need

Classification Information
- Data that describes the entities you and actions
  in a standardized vocabulary
  - o   *Ex. Industry, Business Model, etc.*

Decision Information
- Data that helps inform your decision-making
  process
  - o   *Ex. Revenue, Valuation*
- Data that records the logic behind your decision
  - o   *Ex. Lost Reasons*

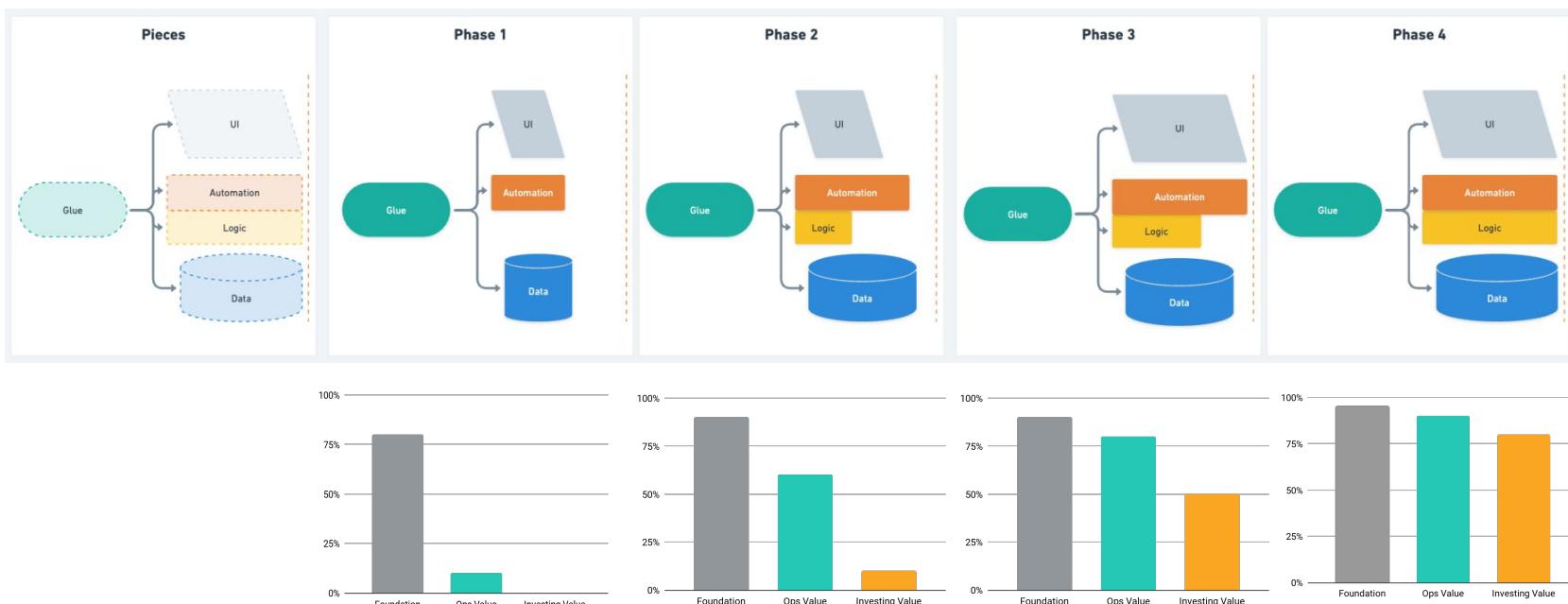**Operational Information**
  data that records what you did, when, and how
  - *EX. Audit Stamps, Resolution Methods*

Accessibility
- Clean and secure access for technology
  services and users

The Path

Vertical slices that deliver value, hardened and integrated after validation
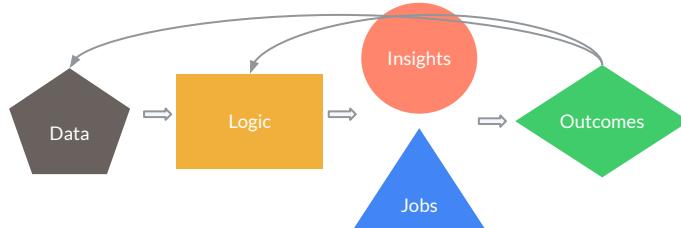
The Atomic Units Of Transformation : Decisions

AI is a tool, not a goal. The goal is to enhance decisions across the investment lifecycle using tools that fit the problems

The Pieces

Intake
- Data - The capture, normalization & organization of information
- Logic - the analysis and/or computation of data

Output
- Insight - evaluations, classifications, and calculations derived from data via logic
- Jobs - Processes and actions associated with Insights
- Outcomes - Results & assessment of quality

The Application

Action Automation
programmatic execution of actions
You make the decision, Your tools execute the actions

Decision Facilitation
Curation of Information + Action Automation
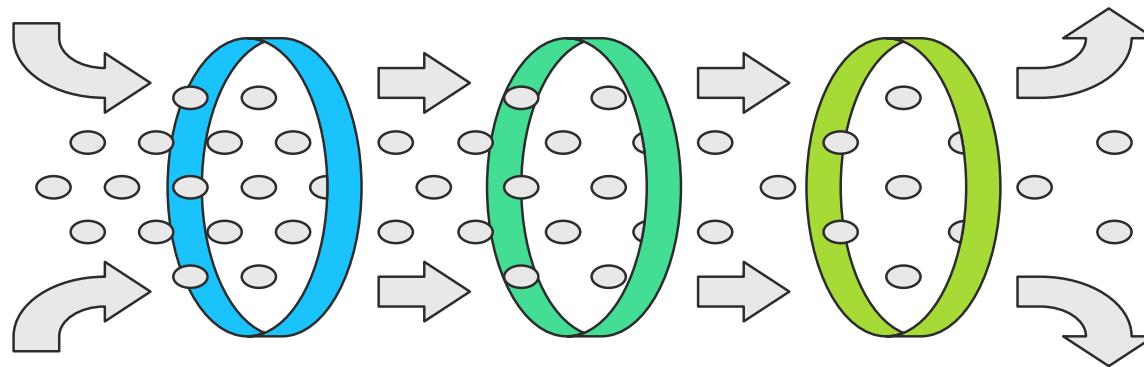*Your tools curate pertinent information, and automatically execute actions for your decision*

Decision Augmentation
Application of Logic to information + Action Automation
Your tools (including AI) do the whole thing

Document Comprehension & Synthesis

Comprehension does not occur in isolation or all at once

Comprehension
Understanding explicit content

Analysis
Deriving meaning and assessing quality

Synthesis
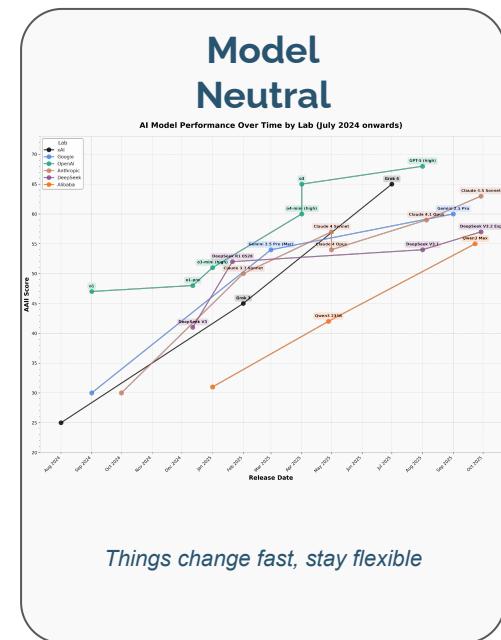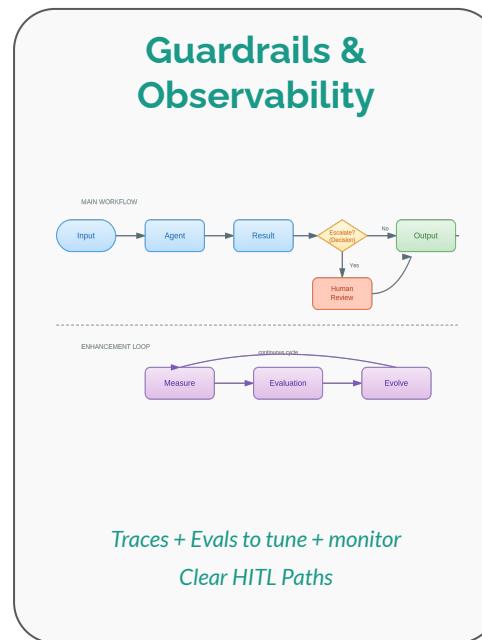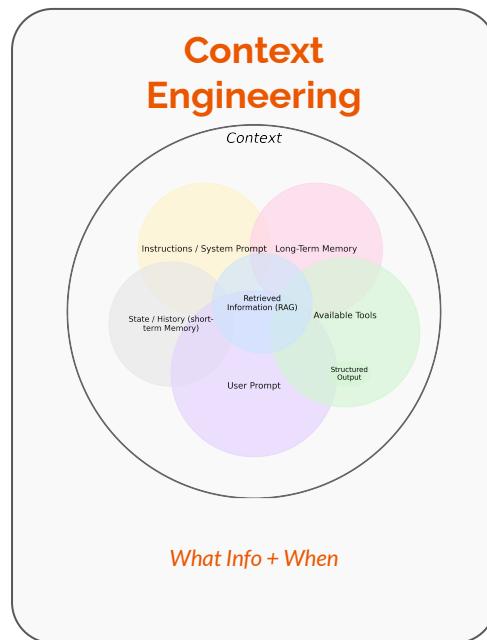Creating value from understanding

Enrichment	+ Entity Enrichment Domain Vocabulary	+ Domain Knowledge Relevant Conventions Historical Context	+ Evaluation Principles Significance Standards

The building blocks of an AI System

Context Engineering

Context

Instructions / System Prompt   Long-Term Memory

Retrieved Information (RAG)

State / History (short-term Memory)   Available Tools

User Prompt   Structured Output

What Info + When

Guardrails & Observability

MAIN WORKFLOW

Input → Agent → Result → Escalate? (Decision) → No → Output

Yes → Human Review

ENHANCEMENT LOOP

continuous cycle

Measure → Evaluation → Evolve

Traces + Evals to tune + monitor

Clear HITL Paths

Model Neutral

AI Model Performance Over Time by Lab (July 2024 onwards)

Things change fast, stay flexible

Venture Mapping

Venture Capital Building Blocks

1. Ideation & Strategy	2. Deal Sourcing & Origination	3. Investment Evaluation & Diligence	4. Investment Execution	5. Portfolio Management & Value Creation
Market Research & Intelligence	Inbound Pipeline Development	Initial Screening	Term Negotiation	Portfolio Monitoring
Thesis Development	Outbound Pipeline Development	Formal Diligence	Closing & Transfer	Portfolio Company Support
Portfolio Modeling & Construction	Network & Ecosystem Development	Investment Decision Support	Onboarding & Storage	Position Management
	Pipeline Management			

6. Fund Strategy & Governance	7. Fund Operations & Administration	8. Investor Relations & LP Management	9. Brand Management	10. Internal Organization Management
Fund Formation & Structuring	Fund Accounting & Finance	Fundraising & Capital Commitments	Market Positioning & Thought Leadership	Team Management & Culture
Governance & Oversight	Legal & Compliance	Capital Flow Management	Public Relations & Media	Knowledge & Data Management
	Performance Tracking & Analytics	LP Communication & Reporting	Community & Ecosystem Building	Technology & Infrastructure
	Administrator & Auditor Coordination	LP Service & Engagement		Strategic Planning & Operations

I. Investment Engine

The front-office system that originates, evaluates, executes, and grows investments.

1. Ideation & Strategy

Market Research & Intelligence: Track macro trends, emerging technologies, and whitespace opportunities
Thesis Development: Formulate, test, and refine investment hypotheses and strategies
Portfolio Modeling & Construction: Define portfolio mix, pacing, allocation, and reserve strategies

2. Deal Sourcing & Origination

Inbound Pipeline Development: Manage and qualify inbound opportunities from networks, events, and platforms
Outbound Pipeline Development: Identify, target, and engage potential investments through proactive research and outreach
Network & Ecosystem Development: Build and maintain relationships with scouts, co-investors, corporates, and accelerators
Pipeline Management: Centralize deal tracking; maintain pipeline analytics and workflow visibility

3. Investment Evaluation & Diligence

Initial Screening: Conduct preliminary assessment of opportunity fit and quality
Formal Diligence: Execute comprehensive evaluation across product, team, market, and financials
Investment Decision Support: Prepare documentation and analysis for investment committee deliberation

4. Investment Execution

Term Negotiation: Lead valuation, structure, and governance discussions

Closing & Transfer: Manage transaction documents and wire

Onboarding & Storage : Capture key company and founder data; Store all relevant transaction and company documents

5. Portfolio Management & Value Creation

Portfolio Monitoring: Track performance metrics, financials, and milestones; maintain reporting systems
Portfolio Company Support: Provide strategic, operational, and platform support
Position Management: Manage follow-ons, reallocations, exits, and distributions

II. Fund & Capital Management

The institutional engine that governs fund performance, capital flow, and compliance.

6. Fund Strategy & Governance

Fund Formation & Structuring: Define fund vehicles, terms, and legal structures
Governance & Oversight: Maintain investment committee, policies, and compliance framework

7. Fund Operations & Administration

Fund Accounting & Finance: Manage capital calls, valuations, audits, and treasury operations
Legal & Compliance: Oversee filings, KYC/AML, ESG, and document management
Performance Tracking & Analytics: Build dashboards; model pacing, liquidity, and performance metrics
Administrator & Auditor Coordination: Coordinate workflows with administrators, auditors, and tax advisors

8. Investor Relations & LP Management

Fundraising & Capital Commitments: Develop fundraising materials; manage LP outreach, diligence, and closings
Capital Flow Management: Track commitments, calls, and distributions; maintain liquidity oversight
LP Communication & Reporting: Deliver reports, updates, and disclosures to limited partners
LP Service & Engagement: Manage LP meetings, advisory boards, and relationship activities

III. Institutional & Ecosystem Development

The long-term infrastructure that sustains firm competitiveness, culture, and brand.

9. External Relations & Brand Development

Market Positioning & Thought Leadership: Define brand narrative; publish insights and thematic research

Public Relations & Media: Manage press, announcements, and event participation

Community & Ecosystem Building: Host events; manage networks of founders, partners, and institutions

10. Internal Platform & Organizational Enablement

Team Management & Culture: Define roles, performance systems, and development programs

Knowledge & Data Management: Maintain research databases, archives, and knowledge systems

Technology & Infrastructure: Operate CRM, analytics, and data platforms; ensure system reliability and security

Strategic Planning & Operations: Conduct annual planning; align objectives and monitor execution efficiency