

PRACTICAL GUIDE FOR PE

5 AI Workflows That Microsoft Won't Build For You

Custom automation that stays valuable as Copilot improves



Portfolio Rollup



CIM Triage



Deal Knowledge



Meeting Prep



Expert Insights

Why These 5 Workflows?

Microsoft Copilot is getting better fast. But there's a category of PE-specific automation that **Microsoft will never standardize**. That's where your edge is.

MICROSOFT WILL HANDLE

- ✗ Basic email summarization
- ✗ Single-document Q&A
- ✗ Meeting transcription + recap
- ✗ Simple draft generation
- ✗ Calendar-based reminders

YOU STILL NEED CUSTOM

- ✓ Multi-format portfolio data normalization
- ✓ PE-specific deal scoring against your criteria
- ✓ Cross-deal institutional knowledge search
- ✓ Multi-source meeting prep orchestration
- ✓ Expert call tagging and theme extraction



Domain Specific

PE workflows that Microsoft won't build — your fund criteria, your formats, your deal stages



Cross-System

Connects data rooms, deal CRMs, and external tools Microsoft doesn't touch



M365 Native

Runs in your tenant using Copilot Studio + Azure OpenAI — your data stays yours



Defensible Value

These workflows won't become commodity features in 6 months

Our clients include **Davidson Kempner** and **Generation Investment Management**

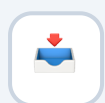
HIGHEST IMPACT

Portfolio Reporting Rollup

WHY MICROSOFT WON'T SOLVE THIS

Your 10 portfolio companies send monthly reports in **10 different formats** — some Excel, some PDF, different column names, different KPI definitions. Someone manually normalizes this every month. Copilot can't handle format variation at this scale.

HOW IT WORKS



Reports arrive



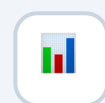
AI extracts



Normalize



Flag issues



Unified view

FORMATS WE HANDLE



Excel Workbooks
Various layouts



PDF Reports
Scanned or digital



Email Bodies
Unstructured updates

Atlas Holdings — Jan

Revenue	£12.3M ↑8%
EBITDA	£2.1M ↑12%
Cash	£1.4M ↓5%

Neptune Services — Jan

Revenue	£8.7M ↑4%
EBITDA	£1.2M ↓2%
Cash	£2.1M ↑15%

2 days

Reduced to 2 hours monthly

Format variation is the moat. No one else solves this.

Document Intelligence

Azure OpenAI

Power Automate

Deploy in **3-4 weeks**

DEAL FLOW

CIM/Teaser Triage

WHY MICROSOFT WON'T SOLVE THIS

Your fund sees **60+ opportunities per month**. Associates spend hours screening deals that will never fit. Copilot can summarize a CIM — but it can't score against your specific mandate, log to your deal tracker, or draft your standard rejection email.

HOW IT WORKS



Teaser arrives



Extract metrics



Score vs criteria



Draft memo



Log to tracker

EXAMPLE: AUTO-SCORED PIPELINE

Project Neptune — Industrial Services

92 — High Fit

SECTOR

✓ Industrial

REVENUE

£18M ✓

EBITDA

£3.2M ✓

GEOGRAPHY

UK ✓

Project Orion — Consumer Tech

34 — Auto-Declined

SECTOR

✗ Consumer

REVENUE

£2M ✗

EBITDA

-£0.5M ✗

GEOGRAPHY

US ✗

70%

Deals auto-triaged before human review

Partners only see qualified opportunities.

Azure OpenAI

Power Automate

DealCloud/Affinity

Deploy in **2-3 weeks**

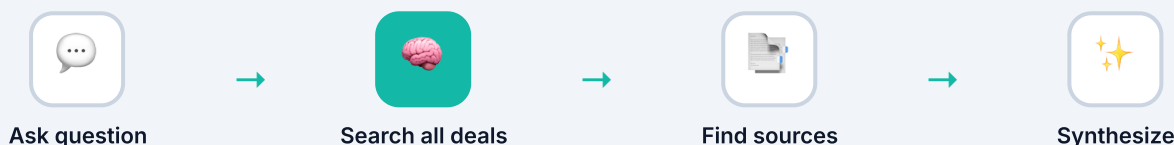
INSTITUTIONAL MEMORY

Cross-Deal Knowledge Search

WHY MICROSOFT WON'T SOLVE THIS

A partner asks: "**What did we learn about supply chain issues across all our manufacturing deals?**" The answer is buried in 50 expert call transcripts, 20 IC memos, and 100 emails across 8 deals. SharePoint Copilot searches one site. You need cross-deal institutional memory.

HOW IT WORKS



🔍 "What supply chain risks have we seen in manufacturing deals?"

Project Atlas — Expert Call (Mar 2024)

"...the **single-source supplier for the motor assembly** is a significant risk. We saw similar issues in Project Titan..."

Project Neptune — IC Memo (Jan 2024)

"Management acknowledged **12-week lead times from Asian suppliers** have impacted working capital..."

Project Orion — DD Findings (Nov 2023)

"**Raw material price volatility** drove margin compression in FY23. Recommend hedging strategy review..."

AI-SYNTHESIZED ANSWER

Across 8 manufacturing deals, three supply chain themes recur: (1) single-source supplier dependency, (2) Asian supplier lead times affecting working capital, and (3) raw material price volatility. Atlas and Titan both had motor assembly concentration. Neptune and Orion faced 10-12 week lead times.

10x

Faster pattern recognition across deals

Your firm's institutional memory, searchable.

Azure AI Search

Copilot Studio

SharePoint

Deploy in **4-6 weeks**

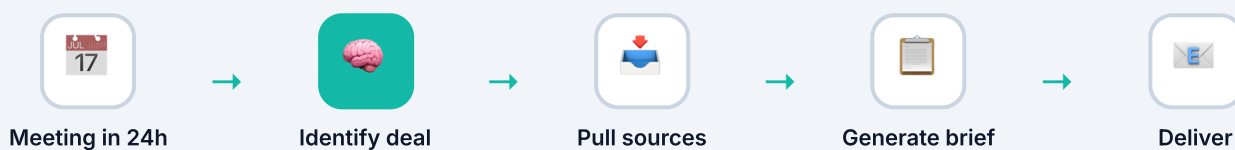
PRODUCTIVITY

Meeting Prep Orchestration

WHY MICROSOFT WON'T SOLVE THIS

Management meeting with TargetCo tomorrow. Someone spends **45 minutes pulling together** the latest CIM, recent emails, expert call notes, news mentions, and open questions. Copilot can summarize one document. You need multi-source aggregation triggered by your calendar.

HOW IT WORKS



EXAMPLE: AUTO-GENERATED BRIEF

Latest Documents

Auto-pulled

- CIM v3 (Updated 15 Jan) — Revenue £18M, EBITDA £3.2M
- Management Accounts Q4 — Margin expansion to 18%
- Last email from advisor (18 Jan) — Exclusivity deadline 31 Jan

Recent Expert Calls

Key insights

- Industry Expert (12 Jan) — "Market growing 8% CAGR, Neptune well-positioned"
- Former Customer (10 Jan) — "Service quality excellent, pricing competitive"

Open Questions

From IC notes

- Customer concentration — Top 3 = 45% of revenue
- Management equity rollover expectations
- FY25 capex requirements for new facility

45 min

Saved per meeting, delivered automatically

Walk in prepared. Every time.

DUE DILIGENCE

Expert Call Enrichment

WHY MICROSOFT WON'T SOLVE THIS

Every deal has 5-15 expert calls. Teams Premium transcribes them. But six months later, "**what did the supply chain expert say about lead times?**" means re-listening to hours of calls. You need PE-specific tagging, theme extraction, and cross-call searchability.

HOW IT WORKS



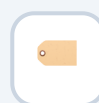
Call ends



Transcript



Extract themes



Tag insights



Make searchable

EXAMPLE: ENRICHED CALL

Expert: ...the **lead times from Asian suppliers** have gone from 6 weeks to 12...

Analyst: How are competitors handling this?

Expert: The **top players are dual-sourcing** now. Neptune is behind on this...

Expert: ...but their **customer retention is exceptional**, 95%+ across the board...

AI-Extracted Insights

Risk Single-source Asian suppliers, 12-week lead times

Risk Behind competitors on dual-sourcing strategy

Strength 95%+ customer retention rate

Market Industry moving to dual-source model

AUTO-TAGGED THEMES

Supply Chain

Competitive Position

Customer Retention

Operational Risk

100%

Of expert calls searchable by insight type

Find what the expert said. Instantly.

Teams Premium

Azure OpenAI

AI Search

Deploy in **2-3 weeks**

How We Deliver These

Every workflow follows the same proven approach. Start small, prove value, then expand.

TYPICAL TIMELINE: 2-4 WEEKS PER WORKFLOW



The Orchestration Layer

Microsoft provides building blocks. We assemble them into workflows that fit how PE actually operates — your criteria, your formats, your deal stages.



Microsoft 365 Native

Everything runs in your tenant. Data never leaves. Azure OpenAI — not ChatGPT — so prompts aren't used for training.



External System Integration

Data rooms (Intralinks, Datasite), deal CRMs (DealCloud, Affinity) — we connect what Microsoft doesn't touch.



Defensible Long-Term

These aren't features Microsoft will ship in 6 months. Domain-specific automation that stays valuable.

The gap isn't AI capability.

It's assembling it into workflows that fit PE operations.

Ready to Automate?

If your team spends hours on work like this,
we should talk.

[Book a Discovery Call](#)

1

Listen

Understand your
workflow pain points

2

Identify

Spot 2-3 highest-impact
opportunities

3

Outline

Map a path — first
prototype in 2 weeks

AiRE is QuantSpark's fractional AI implementation service

launchaire.com · contact@quantspark.com