Harnessing AI for Private Capital: From Origination to Value Creation

Course Agenda

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09:00	**Welcome, introduction & course objectives** James Prebble, Palladium
09:10	**Market Context: AI's Impact on Investment Landscape** James Prebble, Palladium • AI as a Strategic Imperative: Understanding AI's role as both a risk and an accelerant in investment decisions • Investment Opportunities: Identifying new opportunities and risks in the AI-driven market • Industry Benchmarks: How AI is setting new standards in investment success
10:15	**Break**
10:35	**Exploring the Technology, Now and Next** Rich Klee, Palladium • AI Fundamentals: Basic principles of AI and its applications in the investment sector • Applied AI: How AI is practically applied in private equity • Understanding LLMs: The role of large language models in transforming data analysis and decision-making
11:30	**Distribution of Distribution** Rich Klee, Palladium • Real-world impacts of AI
12:20	**Lunch**
13:10	**AI in the Fund: Diligence to Value Creation** Rich Klee, Palladium • AI Tools and Capabilities: Demonstrations of current AI tools used by PE firms

	• Case Studies: Real-life examples of AI deployment by UK private equity funds • Strategic Implementation: How AI is integrated into fund-level strategies
14:00	**The AI-Native Investment Firm** Rich Klee, Palladium • Performance Enhancement: Using AI to drive business performance improvements • Exit Valuations: Impact of AI on increasing exit valuations for investors • Case Studies: Examples of successful AI-driven value creation
15:00	**Break**
15:20	**Checklist for AI Deployment** Rich Klee, Palladium • Data Readiness: Importance of organizing proprietary data for AI applications • Use Case Identification: Identifying and prioritising clear AI use cases • Buying AI: Framework for assessing vendors and services • Talent and Culture: Building a team capable of driving AI change and adoption
16:00	**Driving AI Adoption** Rich Klee and James Prebble, Palladium • Culture & change management strategies, overcoming resistance. • Innovative and experimentative environment fosters success • Creating AI-ready culture, enabler vs disruptor • Ai adoption toolkit • Importance of leadership at the top end
16:30	**Legal Implications of AI** Shane Hubbard, K&L Gates **Building AI** • Obtaining data (implications of scraping and data mining; trends in data licensing; misapprehensions around publicly available data)

	• Development hygiene (keeping an eye on likely compliance requirements including dataset integrity and risk of bias) **Using AI** • Using generative AI for code development (risks and mitigations) • IP ownership of generative AI outputs including creative works and other content (perhaps some surprises) **Deploying AI** • A post-election UK regulatory snapshot
17:00	Session Close & Wrap-up