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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

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	• 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
15:10	Checklist for AI deployment and driving AI adoption 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 • Innovative and experimentative environment fosters success • Importance of AI leadership in the C-suite
16:00	GP Use Cases: AI in Practice Barry Downes, Sure Valley Ventures • Real-world examples of how fund managers are leveraging AI • Implementation considerations, lessons learned, and practical opportunities for adoption
17:00	Session Close & Wrap-up