

STRATEGY OVERVIEW

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PREPARED FOR

Trinity Hunt Partners
Deal Team Intelligence Platform

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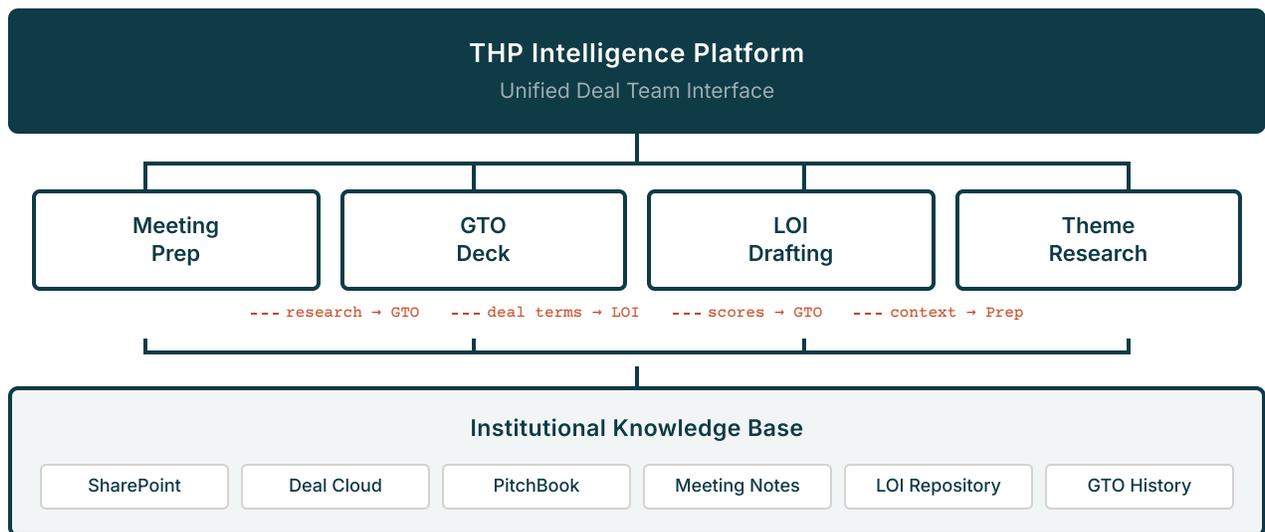
Building an Intelligent Organization

Trinity Hunt's deal team runs on tribal knowledge — pattern recognition built over hundreds of deals, scattered across SharePoint, Deal Cloud, email, and people's heads. Every deal starts from scratch: manual research, manual drafting, manual assembly.

The goal: make institutional knowledge **searchable, reusable, and compounding** — so every deal the firm has ever done makes the next one faster.

HOW IT FITS TOGETHER

Each pilot delivers immediate value. Together, they build a shared intelligence layer that gets smarter with every deal.



Meeting Prep research feeds into **GTO Deck** commentary. **GTO Decks** capture deal terms that feed **LOI Drafting**. **Theme Research** scores appear in GTO Decks and inform meeting context. Each project makes the others better.

THE PILOTS

PILOT	WHAT IT DOES	PHASE 1	PHASE 2
Meeting Prep	Auto-research company, founder, competitors before every call	\$8,500	—
GTO Deck	Generate Go-To-Offer decks from meeting notes + financials	\$12,500	\$12,500
LOI Drafting	Draft LOIs from deal terms with redline to comparable deals	\$12,500	\$12,500
Theme Research	Score industries from PitchBook + company websites	\$8,500	\$8,500

PHASE 1 TOTAL

All four pilots running • Feeding the knowledge base

\$42,000

PHASE 2 TOTAL

Deeper automation • Redline capabilities • Target list building

\$33,500

WHAT GETS BUILT ALONG THE WAY

These aren't separate line items — they're part of how we deliver the pilots:

- THP user experience layer — unified interface for the deal team
- SharePoint document analysis — understanding folder structure and access patterns
- Data pipeline foundations — PitchBook, Deal Cloud, Outlook, web research infrastructure
- Institutional knowledge base — the shared data layer every pilot reads from and writes to

Each pilot builds infrastructure that the others use. By the time all four are running, the platform isn't a separate project — it already exists.

WHERE THIS GOES

As the knowledge base grows, the firm unlocks capabilities that aren't possible today:

- **Full IC Deck generation** — automated investment committee materials from accumulated deal intelligence
- **Cross-portfolio queries** — ask questions across every deal the firm has ever evaluated
- **Board report automation** — generate portfolio company updates from structured data
- **Portfolio company M&A** — deploy deal intelligence tools to 20+ portfolio company acquisition teams
- **Predictive deal intelligence** — pattern matching across historical deals to score new opportunities

The platform isn't a separate project. It's what emerges from doing the work.

APPROACH

We start with one pilot, prove the value, then layer on the next. Each pilot is scoped to deliver standalone value within 3–4 weeks while contributing to the shared knowledge base. The deal team sees results immediately; the compounding effect builds over time.

No multi-month planning phase. No architecture astronautics. We get into the data, build something useful, and iterate from there.

Trinity Hunt has done hundreds of deals. That accumulated knowledge is the firm's most valuable asset — and right now, most of it is locked in people's heads and scattered across systems. We're proposing to unlock it, one pilot at a time.

[View All Interactive Mockups →](#)

Questions? Reach out anytime.

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