

How Venture Capital Built Operational Governance Across Four Investment Teams

Standardized pipelines, automation, and reporting across Venture Capital, Private Equity, Capital Formation, and Private Credit.

Quick Facts

FOUNDED 2018	TEAM SIZE 51 employees
INDUSTRY PE / VC	ANNUAL REVENUE \$10M+ managed

Solutions Provided

- Pipeline & Reporting Governance
- Revisit & Task Automation
- Cross-Team Workflow Design
- CRM Enablement & Data Control

Situation

Venture Capital, a technology-focused investment firm, was managing multiple funds across Venture Capital, Private Equity, Capital Formation, and Private Credit when they engaged elefante RevOps. With HubSpot already in place across teams, they were entering a new phase of operational maturity where reporting accuracy, workflow discipline, and cross-team coordination became critical.

Their investment motion is relationship-driven and deal-focused—sourcing opportunities, progressing them through IC and term sheet stages, and coordinating closely with Capital Formation to raise capital against approved deals. As deal volume increased and fund complexity expanded, fragmented pipelines and inconsistent stage governance began distorting reporting and slowing follow-through.

Pain Points

Inconsistent stage logic and reporting: The firm operated with inconsistent stage logic, static revisit dropdowns, manual note logging, and deal cloning workarounds that distorted funnel reporting across all four teams.

No single trusted view: Leadership did not have a single trusted view of active pipeline versus pass and execution stages; revisit tasks lingered without clear SLAs; and year-based funnel reporting excluded valid deals due to create date logic.

Technical bottlenecks: Conflicting workflows broke fund size calculations, 300+ and 600+ records contained property inconsistencies, and native HubSpot limitations required structured workarounds for task and notification logic.

Multi-team fragmentation: Multiple investment teams operated in the same HubSpot instance with different stage definitions, revisit logic, and dashboard views—further distorting funnel reporting across funds.

Impact & Solution

Initially engaged to fix specific HubSpot workflow and reporting gaps, elefante RevOps quickly became a long-term RevOps partner across all four investment teams. elefante implemented a structured governance and automation framework inside HubSpot:

Pipeline Governance Restructure: Restructured pipelines across VC, PE, CF, and Private Credit to enforce stage governance, separate active from pass and execution stages, and standardize fund, asset class, and investor type logic.

Revisit & Task Automation: Rebuilt revisit workflows so any "Needs Revisiting = Yes" automatically creates a task with 10–20 business-day SLAs; introduced controlled deal cloning for year-based reporting and CEF visibility.

Data Integrity and Governance: Resolved conflicting fund size workflows, cleaned hundreds of inconsistent records, standardized segmentation properties, and redesigned dashboards for accurate active pipeline visibility.

CRM Enablement: Embedded structured onboarding guidance directly inside HubSpot and implemented stage-specific prompts and required uploads to enforce data integrity.

Results

Accurate Year-Based Funnel Reporting

Funnel reporting now reflects real active pipeline with valid deal logic—no longer distorted by create date exclusions or stage confusion.

Automated Revisit Coverage Across All Funds

Revisit tasks are universally triggered with defined business-day SLAs, ensuring no deal or investor relationship falls through the cracks.

Resolved Conflicting Workflows

Fund size calculation conflicts were fixed; active dashboards now correctly exclude Execution and Pass stages.

Full Operational Control

Partners can now review New Deals Created, Active Deals, Stuck Deals, revisit task status, and fund size metrics through real-time dashboards without stage distortion.

New Automated Capabilities

The firm can now automate revisit follow-ups regardless of disqualification reason, enforce stage-level data requirements, trigger cross-team notifications at key milestones, and manage recurring drawdown tasks.

Summary

Venture Capital transitioned from fragmented HubSpot usage and static reporting into a governed, automation-driven RevOps operating model spanning all four funds. What began as workflow fixes evolved into a structured system that supports how the firm actually operates.

Today, they run on standardized pipelines, task-based revisit SLAs, protected active dashboards, enforced stage-level data capture, and embedded onboarding directly inside their CRM. Leadership can trust year-based funnel reporting, teams execute follow-ups through automated task logic, and cross-team coordination happens through defined triggers and notifications rather than manual workarounds.