



FRAMEWORK
FOUNDRY

THINKING TOOLS. COMPETITIVE WEAPONS.

Market Surveillance Conducted for You

Artificial Intelligence Tools Across a Deal's Lifecycle

From Strategic to Tactical. From Investment Thesis Attainment to Productivity.

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Context: Framework Foundry's Ten-Stage Deal Lifecycle



Stage	Emphasis	Example Actions
Strategize	Growth strategy formulation	Valuation target for buyer, organic and inorganic growth strategies, Agree Early
Decide	CEO & BOD inorganic growth decision	To buy or not to buy, rationale, preliminary investment thesis, the buy decision, begin investment thesis metrics, BOD cadence, Agree Early
Find	Search and find target seller	Targeting criteria, ecosystem opportunities, market research, strategic forecasting, search, identify candidate(s), Agree Early
Price	Valuation based on due diligence	Valuation of combination, due diligence, thesis recommendation to BOD, valuation of target, negotiation, LOI. Agree Early
Transact	Close the deal and change ownership	BOD approval on investment thesis, definitive agreement, close the deal, Agree Early, Agree Often
Mobilize	Days 1 through 30, kick-start, onboarding, fast actions	Customer retention, key people retention program, onboarding, communications, combined product roadmap, Agree Often cadence
Launch	Days 31 through 100, integration gets underway	Revenue continuity, 30/60/90 cross-sell plan & execution, integration workstreams ignite, cost reductions, AI pilots, Agree Often
Transform	Implementing a combined firm, change management	Long-duration integration initiatives (4 to 8 quarters), thesis attainment (how much and when)
Remediate	Corrective actions	Investment thesis performance and pace (how much, by when, run rate, course correct, pivot, thesis reset if required. Agree Early
Harmonize	Customers, suppliers, people, processes, systems	Transition to operations, investment thesis measurement, continued thesis attainment initiatives beyond close of integration



AI in Growth Strategy Formulation



Forcing Function	Primary Outcome	Key Metric	Available AI Tools	Comments
Inclusion	Broader set of executives run their own market scans	executives directly querying market data	AlphaSense; Claude; ChatGPT Business	Junior staff no longer gatekeep market research; strategy discussions widen beyond the corp dev team
Speed	Market and competitive scans compress from weeks to days	days to first market-sizing draft	AlphaSense Deep Research; Perplexity Pro	Speed gains concentrate in desk research, not in the judgment that follows it
Productivity (People)	Analysts produce more sector primers and SWOTs per week	primers completed per analyst per month	AlphaSense Workflow Agents; NotebookLM	Frees analyst hours for synthesis rather than search
Expenditures	Lower spend on outside market research and expert-network calls	external research spend as % of strategy budget	AlphaSense; Similarweb	Subscription cost is still material; savings show up in fewer one-off consulting engagements
Other	Investment thesis drafts start from a wider evidence base	sources cited per thesis draft	Claude; ChatGPT Business	The thesis itself, the decision to pursue a strategy, still belongs to the executive team



AI in Decision-Making



Forcing Function	Primary Outcome	Key Metric	Available AI Tools	Comments
Inclusion	More functions see the same scenario data before the go or no-go	functions represented in the decision packet	AlphaSense; Claude; ChatGPT Business	A common data set narrows the room for selective framing among competing sponsors
Speed	IC memos and scenario comparisons turn around faster	days from screen to IC memo	Claude; Rogo	The memo moves faster; the meeting where it is debated does not
Productivity (People)	Fewer analyst-hours spent assembling comparison decks	hours per scenario comparison	AlphaSense Slide Agent; Microsoft Copilot	Time saved on formatting returns to stress-testing assumptions
Expenditures	Reduced reliance on outside advisors for first-pass scenario modeling	advisory fees per decision cycle	Claude; Tactyc	Boards still commission independent fairness opinions; AI shortens the internal pass, not the external one
Other	Consistency checks flag internal contradictions before the board sees them	discrepancies caught pre-submission	Claude; internal QA agents	Boards are not delegating capital-allocation accountability to AI, per California Management Review interviews, and should not



AI in Finding the Right Target



Forcing Function	Primary Outcome	Key Metric	Available AI Tools	Comments
Inclusion	Corp dev screens targets without waiting on banker-curated lists	self-sourced targets as share of pipeline	Grata; SourceScrub	Proprietary deal flow still depends on relationships; the software widens the funnel, not the relationships
Speed	Universe of candidate targets builds in days, not months	days to first target long list	Grata Agentic Search; Cyndx	Faster screening raises the bar; competitors are screening the same universe just as fast
Productivity (People)	Associates review more targets per week without added headcount	targets screened per associate per week	SourceScrub; Affinity	The bottleneck shifts from finding companies to prioritizing which ones earn a partner's hour
Expenditures	Lower per-target cost of initial screening	cost per qualified target	Grata; Apollo	Subscription costs for two or three platforms running in parallel are common and add up
Other	Off-market, thesis-matched targets surface earlier	share of pipeline sourced pre-auction	4Degrees; Intapp DealCloud	Data coverage still thins outside North America and Western Europe; regional gaps persist



AI in Pricing the Deal



Forcing Function	Primary Outcome	Key Metric	Available AI Tools	Comments
Inclusion	Deal team and portfolio operators work from the same comps set	stakeholders with model access	Daloopa; Rogo	Shared inputs do not guarantee shared conclusions; multiple defensible multiples still compete
Speed	First-pass comps and LBO scaffolding build in hours	hours to first valuation range	Rogo; Tactyc; Copilot in Excel	The scaffold is fast; sizing debt, add-backs, and the synergy case still takes a modeler's judgment
Productivity (People)	Analysts build and stress-test more scenarios per deal	sensitivity cases run per valuation	Mosaic; Quantrix AI Assistant	A 2024 PwC benchmark found every AI-only LBO model tested contained a material structural error
Expenditures	Fewer analyst-hours billed to comp-set assembly	hours billed to comps per deal	Daloopa; Macabacus	License cost is modest against the analyst time it displaces on a typical mid-market deal
Other	Cleaner audit trail from data source to valuation output	citations per valuation assumption	Daloopa; Rogo	Comparable-company selection is where judgment still lives; a wrong-sized peer quietly skews the range



AI in Due Diligence, Negotiation, and Closing



Forcing Function	Primary Outcome	Key Metric	Available AI Tools	Comments
Inclusion	More functional leads review live diligence findings, not just counsel	reviewers with data room access	DealRoom; Datasite Diligence	Wider visibility inside the deal team, not wider visibility to the other side of the table
Speed	Contract review across thousands of documents drops from weeks to days	documents reviewed per day	Kira (Litera); Luminance; Harvey	Extraction is fast; negotiating the terms it surfaces stays interpersonal and does not compress the same way
Productivity (People)	Lawyers triage more contracts per associate before senior review	contracts triaged per associate per day	Spellbook; LEGALFLY	LEGALFLY users report contract review time cut roughly in half within weeks of onboarding
Expenditures	Lower outside counsel spend on first-pass contract review	outside counsel hours per diligence phase	Luminance; Kira	Savings concentrate in document-heavy categories; bespoke negotiation still bills at full rate
Other	Change-of-control and non-assignable clauses surface earlier and more reliably	critical clauses missed pre-AI versus post-AI	Kira; Luminance; Datasite AI	AI helps a negotiator walk into the room better prepared; it does not do the talking, per Bain interviews



AI in Standing Up the Integration Office



Forcing Function	Primary Outcome	Key Metric	Available AI Tools	Comments
Inclusion	Functional leads see the same integration plan and risk log from day one	workstream leads with plan visibility	Midaxo; DealRoom	A shared playbook narrows the usual information gap between the deal team and the operators who inherit the plan
Speed	100-day plans stand up in days using reusable playbooks	days from close to a published Day One plan	Midaxo Playbooks; Devensoft	Reuse is the speed lever; a first-time IMO with no prior playbook sees far less of this gain
Productivity (People)	IMO leads coordinate more workstreams without a larger core team	workstreams per IMO lead	Midaxo; Workato	Dedicated PMI tooling is associated with roughly 40% more value captured, per McKinsey research
Expenditures	Lower cost of standing up integration governance from scratch each deal	IMO setup cost per deal	Midaxo; Smartsheet	Enterprise PMI platforms run roughly \$25,000 to \$90,000 a year; infrequent acquirers often do better with Smartsheet plus DealRoom
Other	Diligence findings carry forward into the integration plan without re-keying	diligence issues linked to integration tasks	Midaxo; DealRoom	The historic handoff gap between deal team and integration team is where AI-assisted continuity earns its keep



AI in Day One Readiness



Forcing Function	Primary Outcome	Key Metric	Available AI Tools	Comments
Inclusion	Frontline managers get Day One talking points in their own language and market	markets receiving localized Day One materials	Microsoft Copilot; DeepL; Claude	Translation removes a real barrier; it does not substitute for a leader showing up on site
Speed	Day One communications and FAQs draft in hours across every stakeholder group	hours to finalize the Day One communications kit	Claude; Microsoft Copilot	Drafting is fast; legal and HR sign-off on the message still takes the time it always took
Productivity (People)	Communications teams manage more stakeholder groups without added headcount	stakeholder groups covered per communications lead	Claude; ChatGPT Business	Consistency across markets improves faster than tone does; a native reviewer still catches what the model misses
Expenditures	Lower cost of translation and localization for Day One materials	cost per localized market	DeepL; Microsoft Copilot	A modest software cost against what multi-market translation vendors previously charged per word
Other	Acquired-company employees get faster answers to policy and systems questions	employee questions resolved without escalation	Microsoft Copilot (policy summarization)	One CIO reports using Copilot to summarize acquired-company rules for employees who cannot yet parse unfamiliar internal documentation



AI in Synergy Capture and Integration Execution



Forcing Function	Primary Outcome	Key Metric	Available AI Tools	Comments
Inclusion	Synergy owners across finance, ops, and commercial see the same tracker	synergy owners with live tracker access	Midaxo; Devensoft	Visibility does not equal accountability; someone still has to own the number
Speed	Workstream interdependencies get flagged before they break the timeline	days integration accelerates versus comparable deals	Midaxo; DealRoom	One documented case mapped over 40 workstreams and ran roughly 20% faster than comparable deals; results vary with playbook maturity
Productivity (People)	Fewer manual hours spent compiling synergy status reports	hours per weekly synergy report	DealRoom AI summaries; Midaxo	Reporting time drops; the harder work of closing a plant or migrating a customer does not
Expenditures	Committed-versus-realized synergy variance visible without a manual roll-up	variance reporting lag	Midaxo synergy module; Devensoft	Bain finds 70% of mergers still fail to deliver expected synergies; better tracking surfaces the shortfall sooner, it does not close it
Other	Cross-deal synergy benchmarks inform the current integration's targets	prior-deal benchmarks referenced per plan	Midaxo	Named an IDC MarketScape Leader for AI-enabled deal management in 2025; the benchmark is a starting point, not a guarantee for this deal



AI in Fixing What Integration Breaks



Forcing Function	Primary Outcome	Key Metric	Available AI Tools	Comments
Inclusion	Culture and sentiment signals reach leadership from every level, not just skip-levels	employee voice channels monitored	Culture Amp; CultureMonkey	Employees still need to trust that flagged sentiment leads to action, or the channel goes quiet
Speed	Early friction points surface in weeks rather than at the next scheduled survey	days from friction event to leadership visibility	CultureMonkey; Enculture AI	Early warning only helps if leadership responds before the friction hardens into attrition
Productivity (People)	HR teams triage more open-text feedback without reading every comment manually	feedback comments processed per HR analyst	CultureMonkey; Repustate	NLP handles the volume; the sensitive conversations that follow still require a person
Expenditures	Lower cost per pulse-survey cycle across a newly combined workforce	cost per employee surveyed	CultureMonkey; Culture Amp	Multilingual analysis avoids a separate vendor per region, a real cost saver in cross-border deals
Other	Communication-pattern analysis flags cultural misalignment before it shows up in attrition data	attrition risk flagged pre-departure	NLP-based sentiment platforms	44% of M&A leaders cite poor cultural fit as a top reason integrations fail, per McKinsey; detection is not remediation



AI in Systems and Process Harmonization



Forcing Function	Primary Outcome	Key Metric	Available AI Tools	Comments
Inclusion	IT and ops leads from both companies work off one reconciled data taxonomy	systems owners aligned on a shared taxonomy	LeanIX; Workato	A harmonized taxonomy is a prerequisite for shared AI tooling, not a byproduct of it
Speed	ERP and CRM data standardization compresses from a six-to-twelve-month lift-and-shift	months to a unified system of record	SAP Joule; Microsoft Copilot; Rapti	One CIO calls AI 'the magic dust on top' of a lift-and-shift, not a replacement for the migration itself
Productivity (People)	IT teams reconcile duplicate records and anomalies without a large temporary task force	records reconciled per IT analyst	Rapti; AI-enabled ETL pipelines	Duplicate client records are the most cited stumbling block; cross-business review still catches what automation misses
Expenditures	Lower cost of a dedicated data-cleansing contractor pool per integration	contractor spend on data harmonization	Rapti; Workato	Cost avoidance is real but back-loaded; savings show up months into harmonization, not on day one
Other	Consistent governance, security policy, and KPI definitions across the combined entity	policy conflicts resolved pre-cutover	LeanIX; Microsoft Copilot	A single coordinated engine belongs ahead of sequential phase-gate handoffs; harmonization is where that engine holds or breaks



Key Takeaways



Impact is uneven by design. AI concentrates where the work is document-heavy and repeatable: Find, Transact, and Harmonize. It thins out where the work is a judgment call: Decide, and the negotiating table inside Transact.

Speed and productivity gains are here now; cost gains lag. Cycle-time compression shows up within a single deal. Expenditure reduction takes several deals to become visible against ongoing subscription spend.

Inclusion is the underrated forcing function. Analysis that once sat with a narrow band of analysts and advisors is now available to a wider set of executives and functional leads, at every one of the ten stages.

The vendor landscape is still fragmenting, not consolidating. Point solutions dominate stage by stage in 2026. Connected, end-to-end platforms are emerging but have not yet become the default stack.

No tool owns a decision, a negotiation, or a synergy number. Every stage's Other row lands on some version of the same finding: the software prepares the room; a person still has to walk into it.

Judgment remains unautomated by AI. Developing AI that can judge as a human does is in the works, but has not yet been tackled by AI tools vendors.



Conclusion



The ten stages have not changed. Strategize, Decide, Find, Price, Transact, Mobilize, Launch, Transform, Remediate, and Harmonize still describe the arc of a deal, from investment thesis to full integration.

What has changed is how much evidence a firm can bring to each stage, and how quickly. Grata surfaces a target in an afternoon that a research associate once needed a week to find. Kira flags a change-of-control clause across five thousand contracts before lunch. Midaxo keeps a synergy commitment visible until it is either captured or explained.

None of that replaces the work the playbook was built to protect: agreeing early, agreeing often, and holding a thesis to account across every stage rather than only at signing. AI raises the floor on preparation. It does not raise a hand and take responsibility for the deal.

Judgment remains the safe harbor for human knowledge workers. Human nature creates a natural tension between advancing technologies and trust in human-machine solutions.

The firms that gain the advantage in 2026 will not be the ones with the most AI tools. They will be the ones that know which stage each tool is built for, and which decisions remain theirs to make.



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