PERSONAL AI LEARNING CHART

Priya Menon

Investor/Analyst · 4 weeks · 2× per week, 45 min per session

Name	Priya Menon
Track	Investor/Analyst
Start	2026-06-13
Duration	4 weeks
Sessions	2 per week
Commitment	45 min per session

Lighthouse Chart — Priya Menon

Investor / Analyst Track | 4 Weeks | 2 sessions/week | 45 min/session

1. Opening / Bearings

You have spent 22 years building a judgment infrastructure that most investors never develop — a proprietary diligence framework earned through hundreds of deals, not borrowed from a template. The question you are bringing here is not "can AI help me?" but the sharper one: "where exactly does it help, and where does it introduce noise I cannot afford?" That is the right question, and it is the one this chart is built to answer.

The outcome you named — wiring AI-assisted research into your standard workflow without losing signal — is precise, and precision is what makes it achievable in four weeks. The risk you are managing is real: AI is genuinely useful on the public-information leg of diligence, and genuinely dangerous when it starts filling gaps with confident-sounding fabrications. The plan below keeps those two zones clearly separated.

By the end of week four, you will have run AI-assisted diligence on four deals from the demo day batch, produced a measurable time-to-memo comparison, and codified a one-page framework that tells you — and eventually anyone you bring into the process — exactly which steps belong to the machine and which belong to you.

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2. Track Context

The investor/analyst track is where AI earns its keep fastest and loses trust fastest — often in the same session. The leverage is real: competitive landscape mapping, market sizing synthesis, memo scaffolding, and public-source aggregation are all genuinely compressible with the right prompts. The failure mode is equally real: AI will produce a funding round figure with the same confident tone it uses for a fact it actually knows, and if you are moving fast, you will miss it.

Your existing toolkit — Perplexity for research, Notion for documentation, occasional ChatGPT — already reflects a practitioner's instinct about where AI fits. Perplexity is well-suited to the public-source research leg because it surfaces citations you can verify. Claude is better suited to the synthesis and drafting leg: longer context window, more reliable instruction-following on structured outputs, and — critically for your constraint — a Pro account you already have that keeps your inputs off a shared training pipeline.

The constraint that proprietary deal information cannot go into third-party LLMs is not a limitation to work around — it is a structural boundary that actually clarifies the workflow. Everything before the NDA and the first substantive founder call is public-information territory where AI can work freely. Everything after — cap tables, financial projections, customer names shared in confidence, your own thesis notes — stays offline. The plan below is built around that line, not despite it.

One pattern worth naming early: the investors who get the most out of AI are not the ones who automate the most. They are the ones who use AI to get to a high-quality first draft faster, then apply their judgment to that draft rather than to a blank page. The blank-page problem is where the time goes. That is what this plan targets.

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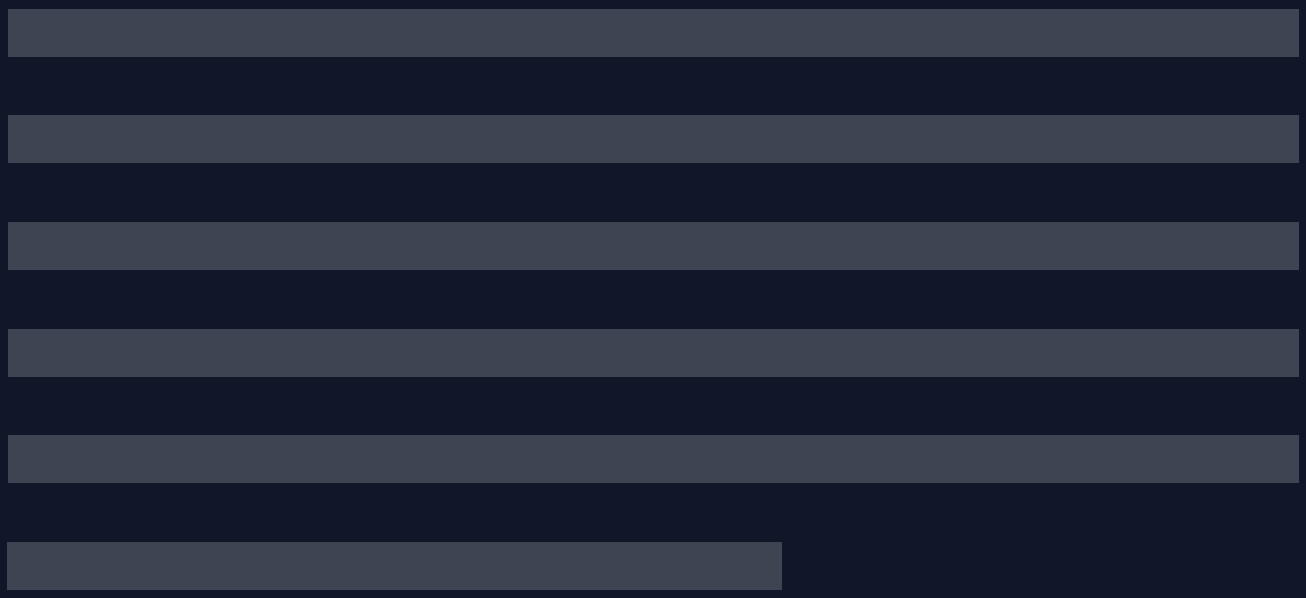
3. Goals & Success Metrics

Priority order:

1. Wire AI into the diligence workflow — specifically the public-information research leg and the memo first-draft scaffold.

The rest of this plan is redacted.

You are seeing the first two pages. The full plan is yours when you create one.



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