

# Building the Semantic Layer: Scaling Enterprise Intelligence at a Global Investment Firm



## The Challenge

A global investment firm with a \$330 billion dollar portfolio and 50,000+ employees struggled with fragmented data. Investment professionals were losing critical time hunting for assets across disconnected systems. Detailed deal records were scattered as a mix of structured data and unstructured documents. Finding information required knowing it existed in the first place, then identifying the right person to grant access—a process that often stalled for weeks.

Additionally, as part of their due diligence process, teams frequently commissioned external research reports, often unaware that similar studies already existed elsewhere in the firm. With expertise siloed by division, the firm was failing to leverage its greatest asset: the collective knowledge of its global workforce.



## The Solution

EK launched a global **Knowledge Portal** that serves as a single lens into the firm's intellectual capital. This portal was built on a graph data model that provides organizational context, developed using AI-driven auto-tagging that enhances the search experience, and delivers dynamically updated pages to the user. The result is a single platform that provides a 360-degree view of existing firm resources, such as research, deals and investments data, relationships, and personnel information.

This has unlocked strategic capabilities such as:

- **Surfacing Lessons Learned:** EK moved beyond basic search by leveraging AI to "read" unstructured content within PowerPoints and emails. The system automatically tags files, extracts "lessons learned," and maps them to structured data points, surfacing insights that were previously buried.
- **Reducing Risk and Increasing Security:** We replaced manual, multi-step approval chains with an automated permissions model. By applying security at the data-point level through a Unified Entitlements Graph, we ensured that users see only what they are authorized to see, without the burden of 22 separate approvals.
- **Making Connections Seamless:** The portal integrates information from 12+ systems into a single view. A semantic layer maintains the relationships between people, deals, and research, allowing users to navigate the enterprise as a connected network rather than a series of folders.

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## The EK Difference

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What sets EK apart is the ability to deliver immediate business impact while simultaneously keeping in mind long-term scalability. We focused on speed to value, launching the Knowledge Portal early as a high-impact product to provide investment teams with immediate utility.

The true EK difference, however, lies in how we evolved that solution. Leveraging our specialized expertise, we are decoupling the Semantic Layer from the portal itself, transforming a single-use tool into a standalone enterprise platform. Throughout 2026, we will be scaling this infrastructure for firm-wide adoption. Because this semantic backbone was first "stress-tested" and enriched by the real-world experiences of the investment teams, the foundation now being laid across the enterprise is not just a theoretical model—it is a field-tested tool ready to power the entire organization.



## The Results

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The Knowledge Portal has transformed how the firm's investment professionals access information and expertise.

- **Accelerated Investment Decisions:** Critical investment data that previously required 22 approvals and up to two weeks of manual processing is now available instantly. This allows the firm to move faster on time-sensitive opportunities, securing a competitive edge in a high-stakes market.
- **Improved Trust and Reliability:** By delivering a 360-degree view of due diligence, financial performance, and partner history in one place, the portal has eliminated the "guesswork" of decision-making. Investment committees now operate with a higher degree of confidence, knowing they are viewing the most reliable, complete, and up-to-date data available across the enterprise.
- **Reduced Reliance on External Research:** A significant drop in the purchase of duplicate external research and data sets.

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- **Rapid Upskilling:** New hires and junior staff can now get up to speed faster by accessing the "lessons learned" automatically extracted from historical deal documents as well as quickly finding experts across the firm who can help.
- **Enterprise Readiness:** What began as a high-impact MVP is now being scaled as the firm's universal semantic layer, ready to power the next generation of data-driven decisions.

Ultimately, the Knowledge Portal has shifted the firm from a state of fragmented information to one of collective intelligence, ensuring that every investment decision is backed by the full weight of the organization's global expertise and data.

Enterprise Knowledge (EK) is a services firm that integrates Knowledge Management, Information Management, Information Technology, and Agile Approaches to deliver comprehensive solutions. Our mission is to form true partnerships with our clients, listening and collaborating to create tailored, practical, and results-oriented solutions that enable them to thrive and adapt to changing needs.

Our core services include strategy, design, and development of Knowledge and Information Management systems, with proven approaches for Data and Information Management, Knowledge Graph Implementation in support of NLP, ML, and AI initiatives, Taxonomy Design, Project Strategy and Road Mapping, Brand and Content Strategy, Change Management and Communication, and Agile Transformation and Facilitation. At the heart of these services, we always focus on working alongside our clients to understand their needs, ensuring we can provide practical and achievable solutions on an iterative, ongoing basis.