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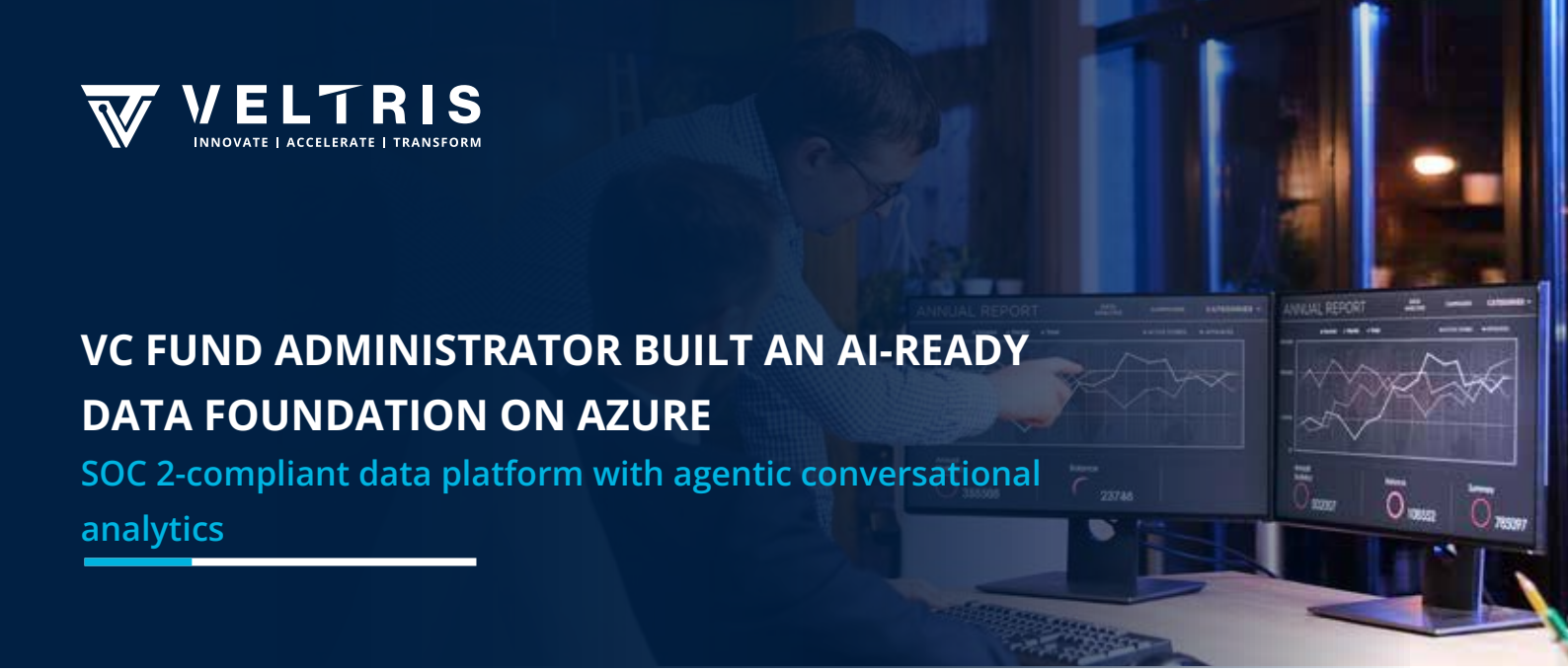

VC FUND ADMINISTRATOR BUILT AN AI-READY DATA FOUNDATION ON AZURE

SOC 2-compliant data platform with agentic conversational analytics

Challenge

A leading venture capital fund administration firm handling sensitive investor communications had large volumes of data in Salesforce but lacked a formal data warehouse and unified analytics layer. Siloed data limited visibility, advanced reporting, and predictive insights across the business, while enterprise-grade security, SOC 2 compliance, and audit readiness were non-negotiable. The firm needed a future-ready architecture to adopt AI and conversation-al analytics without disrupting operations.

Approach

Designed a secure, scalable Azure-based data engineering platform integrated with Salesforce, unifying fragmented sources into a single governed analytics foundation.

Implemented a governed data pipeline to migrate and centralize data while enforcing SOC 2 and PCI-aligned controls across ingestion, processing, and consumption layers.

Embedded enterprise-grade data governance, monitoring, auditability, and role-based access across the platform to meet investor-grade compliance requirements.

Introduced an Agentic Conversational Analytics platform with LLM-powered insights, enabling natural-language access to structured and unstructured data for business users.

Outcomes Delivered

Reduced data silos and unified investor and operational data into a governed Azure platform ready for advanced reporting and predictive analytics.

Improved compliance readiness with SOC 2 and PCI-aligned controls, role-based access, and full auditability embedded across the data lifecycle.

Enabled AI and LLM adoption with conversational analytics that simplify decision-making and accelerate insight-driven business outcomes.

Closing

Veltris combined governed data engineering, embedded compliance, and agentic conversational AI to give a venture capital fund administrator an enterprise-grade, AI-ready platform — turning fragmented Salesforce data into a secure, insight-driven foundation for investor operations.