



# How mid-market firms are leveraging technology to compete with mega managers

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**This article explores how mid-market General Partners (GPs) are seeking to level the playing field with larger rival investment firms by embracing new technology solutions to drive operational efficiency, improve compliance, operations, and investor relations.**

As we covered in [our previous article](#), innovative technology solutions are now within reach for private capital managers and many of the most successful mid-market GPs aren't just exploring these tools, they're putting them to work to scale faster, work smarter, and stay competitive. This is particularly important for mid-market firms: those with limited internal resources, but big ambitions to keep pace with larger competitors.

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In conversations with firms like these, we often hear things like, "We're a top 300 firm, but not a top 30." There is a clear recognition of the gap between mid-market and mega-managers, but also a growing determination to close it – with technology as the great equalizer.

## The competitive landscape: Why mid-market GPs need technology to compete

We have talked previously about how private market fundraising is fiercely competitive. Global fundraising has slowed, and early indicators suggest 2025 is continuing the trend.

As the sector continues to grow, so does the consolidation of capital amongst the largest managers – claiming almost 50% of funds raised in the U.S. private markets last year<sup>1</sup>. In fact, 87% of capital went to experienced managers, marking a record high. Notable examples include EQT's \$23.7 billion close, as well as major launches from CVC and Blackstone in Asia, each targeting over \$10 billion<sup>2</sup>.

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<sup>1</sup> Pitchbook, [PE fundraising expected to slow after period of sustained growth](#), January 2025

<sup>2</sup> Pitchbook, [Annual Global Private Market Fundraising Report](#), March 2025

Without the seemingly limitless war chest of their larger counterparts – middle market managers who embrace digital transformation are able to compete for those funds at scale without sacrificing the investor experience or massively expanding headcount.

This is, in many ways, a modern David vs. Goliath scenario where agility, focus and the smart application of technology can beat brute scale.

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## Leveraging technology for complex compliance tasks

Raising capital internationally has never been more complicated and with the regulations only further diverging across jurisdictions, the right technology is the only answer for managers looking to stay ahead of the curve.

Given market uncertainty, rising costs, and talent scarcity, simply throwing bodies at the problem is not an option. With the right tools, managers can automate routine compliance tasks, reduce human error, and, most importantly, centralize information and tasks across departments to provide a real-time, golden source of truth.

## Streamlining document management for faster deal-making

It is not just compliance tasks which are sapping the time of over-stretched GPs. Technology is already transforming fund administration with a focus on reducing the burden of general administrative tasks<sup>3</sup>. Managing the huge volume of documentation has long been a challenge. Tasks such as document tracking, version control and signature collecting have all typically been manual, time-consuming tasks which can quickly overwhelm mid-market sized firms.

New technologies, including AI and e-signature solutions, are transforming this process. They allow firms to standardize and accelerate deal documentation and investor onboarding with minimal manual effort. Crucially, document management no longer needs to be a fragmented experience. Integrated or built-in CRM and reporting systems now centralize workflows, improving collaboration across teams, deal visibility, and onboarding timelines.

## Jack of all trades or best in class?

As managers build their tech ecosystem, it is becoming more and more critical to consider how these platforms can and should communicate and the benefits and trade-offs of leveraging an all-in-one solution or building your own path with a best-of-breed approach. Managers should assess the ease of integration with existing processes, how much vendor support is provided, the potential to scale with the technology, and levels of security the platform offers. It's not a one size fits all. GPs need to select technology solutions which work for their strategy, both now and in the future.

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<sup>3</sup> Preqin, [The need for digital transformation: how technology is reshaping private equity fund administration](#), October 2024

## Conclusion: Why technology is the key to success

Technology has redefined what is possible for private market participants. Smart software is now essential for GPs looking to manage regulatory complexity, reduce manual workloads, and deliver a seamless investor experience. The most successful mid-market firms are already leveraging these tools to stay ahead and those who do not risk falling behind. In today's competitive environment, embracing technology is not just a path to success – it is a matter of survival.

But with any meaningful change in the way we work, there will need to be a period of experimentation where GPs will take a degree of risk as they seek to understand what solutions work best for them. However, the potential of this new technology is game-changing for mid-market managers. In the short term, there could be tangible cost savings from an operational perspective by helping firms scale without dramatically increasing the headcount to that of larger firms.

Long-term, investing in innovative technology brings many sustainable benefits. Firms will be more resilient to withstand any downturn and will enhance investor trust by committing and investing in modern infrastructure to set the stage for long-term growth.

## Ready to compete with the top 30 firms?

If you are a professional at a mid-market firm, you are likely managing a growing investor base with limited resources: chasing capital, navigating compliance, and juggling countless touchpoints. Bite Stream helps you do more with less by automating investor workflows, streamlining onboarding, and centralizing data – giving you the clarity and capacity to raise capital more efficiently and stay ahead of the competition.



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