

From Grunt Work to Growth Work - AI Guide

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Introduction

AI is transforming the very foundation of early-career work in asset management and beyond. For decades, repetitive “grunt work” — from reconciling spreadsheets to updating CRMs — served as the proving ground for young professionals. These tasks built discipline, provided context, and allowed juniors to learn by doing. Today, automation completes much of that work faster, cheaper, and with fewer errors.

While this shift unlocks massive productivity gains, it also sparks an urgent question: if AI takes over the work that once trained interns and analysts, how do firms cultivate tomorrow’s leaders? The future of talent will not be shaped by repetition, but by how well organizations redesign entry-level roles, create intentional learning ecosystems, and position AI as both a tutor and collaborator.

Get Started 

AI Guide 1: AI Skills Interview Rubric

How to evaluate AI fluency in candidates:

Category	Beginner	Intermediate	Advanced
Foundational Awareness	Knows AI as a buzzword, struggles to name tools	Can name major models/tools, basic concepts	Explains the importance of models, prompts and context
Hands-On Fluency	Little to no practical use	Occasional use for simple tasks, crafts prompts	Daily use, iterates outputs, enhances prompts
Critical Thinking	Accepts AI outputs at face value	Sometimes validates outputs	Rigorously tests, spots errors & gaps
Workflow Integration	Uses AI in isolation as a chat function	Basic pairing with Excel/PowerPoint	Seamlessly integrates with firm tools
Problem-Solving	Completes tasks manually	Uses AI but output is rough	Uses AI thoughtfully, refines to high-quality
Mindset	Resistant or skeptical	Open but inconsistent	AI-native mindset, proactive, stays current

Use this rubric to score candidates across 6 categories, from **Beginner** → **Advanced**.

AI Guide 2: Training Pathway for AI-Native Analysts

What to assign now that grunt work is gone

Week 1–4: Foundation

- Learn firm workflows, datasets, LP expectations, read past manager reports
- Practice prompting and validating AI outputs.
- Document “what good looks like” for memos and reports.

Month 2–3: Application

- Critique AI-generated memos and decks.
- Build prompts/templates for recurring tasks.
- Begin deeper research projects (manager comparisons, ESG analysis).

Month 4–6: Judgment

- Conduct scenario analysis and stress tests.
- Shape AI data into LP-facing narratives, or manager meeting agendas.
- Capture institutional memory from seniors into prompts and frameworks.

Month 6–12: Leadership Pathway

- Drive AI adoption within the team.
- Train peers on best practices.
- Own a mini-research domain with differentiated insights.

AI Guide 3: 7 Traits of Standout Analysts in the AI Era

1. **Critical Thinking:** Asking what's missing beyond the AI answer.
2. **Context & Judgment:** Applying firm philosophy and LP or GP knowledge.
3. **Framework Builders:** Teaching AI how the firm thinks.
4. **Creativity & Storytelling:** Turning outputs into compelling narratives.
5. **Collaboration & Influence:** Driving adoption across teams.
6. **Ethics & Risk Spotting:** Catching blind spots, biases, reputational risks.
7. **Original Research & Data:** Pairing AI with unique datasets and insights.

 ***AI makes the average analyst faster. It makes the exceptional analyst indispensable.***

Building an intentional AI ecosystem


- When every analyst has access to AI, the edge is not in the tool itself but how it fits into workflows.

Dimensions to Evaluate Tools

- Integration: Does it connect seamlessly with diligence platforms, CRM, RMS, Excel, email, etc.?
- Functionality: Does it solve real problems (document parsing, memo generation, DDQ autofill, LP reporting) or just “sound cool”?
- Centrality: Is it mission-critical for investment/IR, or nice-to-have?

Example Categories

- Central: Diligence platforms, memo generators, AI copilots.
- Functional: Document classifiers, meeting note summarizers, RFP assistants.
- Integrated: Tools embedded in Excel, PowerPoint, CRM.

 ***Build a library of approved AI tools ranked by these dimensions, so teams know what to use where.***

Conclusion

AI is redesigning opportunities for young professionals.. The disappearance of traditional grunt work presents a design challenge for firms: how to develop analysts and associates who are AI-fluent while still anchored in human skills like critical thinking, creativity, empathy, and judgment.

Firms that embrace this shift will build more resilient organizations: juniors who learn faster, mid-levels who integrate AI into workflows, and seniors who mentor with context and oversight. By striking the right balance between AI efficiency and human development, firms will not only future-proof their talent pipelines but also unlock exponential value — creating AI-powered, human-led teams that define the next era of growth.

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