



VENTURE CAPITAL

**From fragmented to unified.**  
How USV turned siloed data  
into a source of truth with Attio.

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# How USV turned siloed data into a source of truth with Attio

A CONVERSATION WITH:



**Lauren Young** · Head of Network Operations  
**Matt Cynamon** · Head of Library Sciences



## About

Union Square Ventures is a venture capital firm that invests at the edge of large markets being transformed by technological and societal pressures.

## Industry

Venture Capital

## Company size

11-50

## Headquarters

New York City, New York

## Founded

2003

## Key features

Custom objects

Workflows

Integrations

## Challenge

Union Square Ventures (USV) was struggling with a legacy CRM that kept their team siloed and relationship data scattered. They needed a platform to consolidate their business operations and ensure team-wide visibility.

## Solution

Use Attio to build a flexible CRM that perfectly matches their business model, organizes all their unique data, and automates updates for the whole team.

## Results

- 90% company adoption in under three months, up from two users on legacy CRM.
- Managing 100+ annual events and all deal flow seamlessly in one place.
- A unified view of thousands of founder and investor relationships.
- Fully automated onboarding workflows that save hours of valuable time each day.

## Investing at the edge

In April 2000, the dot-com bubble burst, turning the venture capital industry upside down. But where others saw chaos in the market, two investors saw an unprecedented opportunity to build something new.

Fred Wilson and Brad Burnham founded Union Square Ventures in 2003 with a clear mission: invest in and foster early-stage, category-transforming companies.

"USV invests at the edge of large markets that are being transformed by technological and societal pressures," shares Matt Cynamon, Head of Library Sciences. "We source founders that are determined to transform the world's largest industries."

As USV matured, they supported founders across emerging technologies, including social media, fintech, energy, climate, and more. To date, they've backed the rise of industry titans, from Twitter, Duolingo, and Etsy, to Twilio, Stripe, Coinbase, and more.

## Limited by legacy CRMs

For the USV team, defining success includes cultivating and strengthening relationships, connecting talented candidates to their portfolio, and maintaining a diverse network of stakeholders. As they scaled their operations, the team struggled with rigid legacy CRMs that couldn't represent this data how they needed, creating serious adoption challenges.

"We spent a long time trying to make our CRM work for us, but it was a total nightmare," says Lauren Young, Head of Network Operations. "It required so much onboarding to add any value that in the end, only two of us actually used it, meaning a lot of important data wasn't being captured."

As their portfolio diversified, the team found it difficult to track their expanding universe of contacts in sufficient detail. USV tried switching to a CRM custom-built for venture capital firms, but found it still lacked key features.

"A lot of really obvious functionality was missing," says Matt. "Very few CRMs even allow you to search your database, and we wanted to start customizing it right out of the box."

For USV, working with a CRM was a huge burden: critical data was being lost across different teams and projects, and no one wanted to use it.

## "This feels like magic."

Word of Attio first reached USV in 2023 when one of their portfolio companies, Forerunner, began using the platform.

"Our partner, Nick, was so eager to learn more that he spoke to some Attio customers," recalls Matt. "He came back to us and said, 'Attio feels like magic. This is what software should look and feel like. Let's give it a try.'"

USV made the leap immediately, and were blown away from the moment the team synced their inboxes into Attio.

"We've struggled with fragmented software usage for over 20 years," says Lauren. "But with Attio, all of the deal and relationship data that was once scattered across our stack has been pulled into one place. Having instant access to all our data is incredible. It definitely does feel like magic."

"Even though I'm not a CRM expert, migrating to Attio was seamless," adds Matt. "The Attio team is also always responsive, thoughtful, and eager to help when we have any questions."

## How Union Square Ventures uses Attio

USV uses Attio as the core platform for enriching, organizing, and understanding all their relationship data. "We're a venture capital firm, so we find entrepreneurs, we invest in them and we manage our deals in Attio," says Lauren.

"We have a pretty unique data structure, which is split between two distinct but interconnected datasets: new deals, and our current network, which includes employees, partners, searches, and all our events. We spent years struggling to represent this in legacy CRMs, but Attio made it easy to set it up our way, in no time at all."

### Building custom objects to mirror business operations

USV uses Attio's powerful data model to perfectly match their unique business and data structures.

In addition to the standard Companies and People objects, the team built two custom objects to capture their data, their way: Events and Searches.

"Outside of writing checks, events are probably the biggest thing that we do," says Lauren. "We host over a hundred every year – all the way from intimate breakfasts to large parties with over 300 attendees. The Events object makes it easy to see when they're happening, who's attending, what they're about, and more."

The team also uses the Searches object to organize talent searching for their portfolio companies. By leveraging workflows and relationship attributes, USV now has total visibility over their executive searches.

"Our Talent Partner can see which firm is related to which talent search, so that she can meet with the relevant portfolio company and review their searches with them, making the whole prospecting process much more efficient."

Building out these unique objects and attributes has allowed USV to truly represent their data model, massively improving their data cleanliness and business operations.

### Automating their entire stack

Attio is central to USV's stack. The team uses Polytomic – a bidirectional ETL tool – to enrich records in Attio with data from Harmonic, a startup database that tracks over 20 million companies.

"We've set up an automation where we make a query about a range of companies inside Harmonic and automatically pull those results into a list in Attio," says Lauren. "I can then easily share that data directly with partners, right inside Attio."

Automated updates about events and prospects are crucial to enable USV's senior leadership to focus on more strategic tasks.

"If a deal stage changes from In talks to Closed, the status of that company's CEO is immediately converted into an 'Active' portfolio within our network, so we can outreach to them as needed."

Matt and Lauren also use Zapier to optimize the onboarding process inside Attio. "All we need to do is press a button and the selected record is published in a public-facing directory, added to a Google Group, and sent an automatic onboarding email. It works just like magic."

Attio workflows have also transformed the efficiency of USV operations. "A single run saves me up to 10 minutes per task," says Lauren. "So, when you repeat that across numerous items, it quickly adds up to hours saved each day. And that's just me – the cumulative effect across the team is immense."

### A single source of truth for the whole team

USV needed to break down the silos that prevented team-wide visibility into the prospecting process and deal pipeline. Now, Attio acts as a single source of truth that over 90% of the team don't just tolerate working in, but actively enjoy using.

"Attio is the furthest we've ever gotten with any kind of firm-wide software – it's a huge improvement," says Matt.

"With software as essential as CRM, it's crucial that you not only pick a tool that improves your workflow quality but also one your team actually wants to use. With Attio, we've found a solution that does it all."

USV partners especially love the browser extension. "Partners can meet prospects right in their inbox, and, at the click of a button, get all of the context they need from Attio and enriched data. It's such a small thing, but it adds immense value for our team every day," says Lauren.

## Building the future with Attio

"CRM – it can make you nervous," says Matt. "There's always a risk in migrating from the known to the unknown, but with Attio it's completely paid off – we haven't looked back since."

USV are adding additional custom objects to make their data even more nuanced, alongside building out how they import event attendee data into Attio. "We're probably 40% of the way into using Attio to its full capabilities, and we have so much more that we can do," says Lauren.

"Our setup, like our business, is always evolving, but we're confident that there's a path to building whatever we need with Attio," adds Matt. "It truly feels like a prime example of best-in-class software that absolutely anyone can use."

Attio has revolutionized how USV views CRM. Now, the team are eager to see how the platform continues to add value into their next decade of ventures and beyond.

"Attio is the tool at the center of all our relationships: past, present and future. We've been around for 20 years — we're going to be around for many more. We're really excited to continue building out our vision with Attio."