

Telepatia and Convey Raise as Self-Driving Labs, Verified AI, and ROI Discipline Gain Momentum

VC Tech Radar

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Applied AI healthcare, operations, and formal verification produced the clearest early-stage funding signals in this batch. The strongest technical and market themes were self-driving labs, robotics data infrastructure, AI reliability, and a sharper investor focus on ROI, sovereignty, and founder leverage.

1) Funding & Deals

a16z led the two clearest applied-AI workflow rounds in this set, while Khosla and YC/First Round backed formal verification and AI-native growth software [1, 2, 3, 4].

- **Telepatia — \$42M total, including a \$33M Series A led by a16z.** The company is building an AI-native clinical platform for Latin America that combines an AI scribe, clinical decision support, and an AI auditor connected to hospital data sources [5, 1]. Since launching in July 2025, it says the platform has deployed across 25+ hospital systems in Brazil, Colombia, and Mexico, reaching 100k+ doctors and nurses and 14M patients [5, 1].
- **ConveyAI — \$38M Series A led by a16z.** Convey positions itself as AI teammates for non-technical teams: users share a screen, walk through a process, and agents run the work inside existing systems, escalating when stuck [2, 6]. The company says its agents have already completed 1.1M+ hours of work at NBCUniversal, TelevisaUnivision, Unity, Samsara, ChargePoint, and Faire [2].
- **Pramaana — \$27M seed led by Khosla Ventures.** The company is targeting high-liability domains such as tax, law, finance, and healthcare

by converting statutes and regulations into machine-verifiable code and attaching mathematical proofs of correctness to outputs [3].

Auto formalization will be an important new area. [7]

- **PloyAI — \$27M seed led by Y Combinator and First Round.** Bryant Chou’s new company wants the website to function as an autonomous growth engine, tying together site, brand, CMS, CRM, campaigns, analytics, SEO/AEO, and customer data in one platform [4]. Early users cited include Hex, Clay, Tonik, and TNT Growth [4].
- **XDOF — \$70M for robotics infrastructure.** XDOF says it is building the core robotic infrastructure ecosystem for robot foundation models [8].

2) Emerging Teams

- **XDOF’s founding team has unusually direct robotics pedigree.** Philipps Wu, Fred Shentu, and Nemo Jin say they came out of Covariant, Meta, and Tesla with a shared focus on general-purpose robots, and that XDOF has spent the last two years supporting major labs and companies deploying robots with full-stack expertise across hardware, operations, and policy training [8].
- **Telepatia combines founder-product fit with real deployment.** Nicolás says the company was inspired by his physician father’s death at 58 from a preventable drug interaction, and frames Telepatia as an AI Doctor for doctors, by doctors [5, 1]. The company also says it is already live in 25+ health institutions serving more than 100,000 doctors and nurses across Latin America [5].
- **Bryant Chou / PloyAI is a strong operator-to-founder transition.** Chou spent 12 years at Webflow as founding CTO and says he also started the marketing and sales teams that drove some of the company’s fastest growth periods [4]. That mix of product and growth experience fits PloyAI’s all-in-one GTM thesis [4].
- **Kinro AI is a useful YC launch to watch.** YC describes it as an autonomous insurance brokerage where AI agents quote, answer, and serve customer needs 24/7; founders are Corentin, Pierre, and Parth [9].
- **Suhail is back in the market with a newly funded AI startup.** He said the seed round is done, the effort started with 2×8xB200s, he is using an autonomous AI scientist for new optimizations, and he is hiring employee #1 [10, 11, 12, 13].

3) AI & Tech Breakthroughs

- **Radical AI’s self-driving lab is the clearest hard-tech result in the set.** The company says its closed-loop system—an AI scientist generating hypotheses and automated robotics synthesizing and characterizing materials—produced and characterized 1,200 alloys in six months, versus a DARPA/GE MACH target of 500 in a year [14]. It also says the AI scientist proposed and tested 300 new materials, with 10 reaching novel state-of-the-art properties that are now being developed for commercial applications [14].

Now imagine every scientist in the United States doing 10 times the research output. [14]

- **Robot foundation-model infrastructure is getting more open data.** XDOF open-sourced ABC-130K, which it describes as the largest open-source teleoperation dataset, in collaboration with UC Berkeley, Carnegie Mellon, MIT, and Amazon FAR [8, 15].
- **Legal and compliance AI is moving toward verification, not just generation.** Pramaana’s approach is to formalize statutes and regulations into machine-verifiable code with proofs of correctness [3], while Crosby Intelligence launched to advance legal AI and released the RedlineBench benchmark on Hugging Face [16, 17].
- **GLM 5.2 is a notable open-source model signal, with caveats.** One investor account highlighted benchmark wins over Opus 4.8 and GPT 5.5 on some evaluations, while also saying internal evaluations still place it behind those models and calling it a major win for open-source AI [18].

4) Market Signals

- **Enterprise AI buyers are moving from token consumption to ROI.** Tiffany Luck said the market has gone from *token maxing* to ROI, and pointed to Factory’s model router, Ramp’s spend-management work, and a new crop of seed-stage companies tackling AI usage metering and observability [19]. On the standards side, she also flagged iuc’s attempt to provide Moody’s-like or private SOC 2-style safety certification for AI systems [19].
- **Forward-deployed support still matters in AI adoption.** Luck described sending internal team members alongside customers to help them build workflows and succeed with the product, framing that work as both adoption infrastructure and a feedback loop for product learning [19].
- **The fullstack founder thesis is moving from rhetoric to operating evidence.** Garry Tan amplified the view that AI compresses the gap between technical and non-technical founders, and pointed to a three-founder company that reached \$3M ARR and 2,000+ customers in under

a year with each founder spanning product, outbound, content, and sales [20, 21]. Separately, a PM-turned-solo founder said AI coding tools let them build and run a real-estate-adjacent product with paying users, a signed B2B partnership, and rough break-even economics [22].

- **Reliability is becoming a design principle for practical agents.** One founder building a WhatsApp assistant for real-estate agencies moved all consequential decisions—date parsing, intent routing, property matching, and contract type—into deterministic Node.js logic, leaving GPT-4o-mini to handle only natural-language replies after earlier end-to-end LLM handling proved unreliable [23]. This aligns with a broader push toward verified or bounded AI behavior in higher-stakes workflows [3].
- **European AI investors are leaning into repeat founders and sovereignty themes.** Luciana Lixandru pointed to repeat founders such as Arthur Waller at Pennylane and to defense companies like Stark as examples of where ambition is rising, while arguing that AI is acting as a great equaliser for European founders by reducing geography as a disadvantage [24, 25, 26, 27].
- **Open-source / PRC model progress is drawing explicit concern.** Marc Andreessen amplified a post arguing GLM 5.2 is around Opus 4.7-4.8 level and replied, *Concerning*. [28, 29].

5) Worth Your Time

- **NEA’s Tiffany Luck on enterprise AI ROI** — the cleanest investor/operator discussion here on why enterprise AI evaluation is moving from raw usage to ROI, and why routing and spend-management layers matter [19].



NEA's Tiffany Luck says enterprises are still figuring out their AI ROI | Equity Podcast (17:13)

- **Latent Space: The Self-Driving Lab** — Joseph Krause, Radical AI — the best technical read in this batch on why the moat may be experimental data plus lab infrastructure, with concrete throughput and commercialization results [14].
- **Pramaana launch thread** — the clearest primary-source articulation here of the provably correct AI thesis for regulated domains [3].
- **Telepatia founder thread** — useful for understanding both the product surface and the founder motivation behind an AI-native clinical platform for Latin America [5].
- **ABC-130K on Hugging Face** and **RedlineBench on Hugging Face** — two open resources worth opening if you are tracking robotics data infrastructure or legal AI evaluation [15, 8, 17].

Sources

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