

HOW TO **SCREEN,** **SCORE,** AND **CURATE** A CVC DEAL PIPELINE

Go / No-go decision & Investment readiness

WHERE THIS IS USED

- CVC pre-investment transitions
- Corporate Venture Capital programs
- Investment screening committees

AUDIENCE

- CVC Investment Managers
- Heads of Corporate Venture
- Investment Analysts
- Executive Sponsors
- CEOs of CVC programs

PHASE

Phase Two: Validation & Design → CVC Deal Screening (Concurrent with Weeks 6–12)

EXECUTIVE SUMMARY

Corporate Venture Capital (CVC) programs in the GCC and globally face a consistent challenge: deal flow is abundant, but qualified, strategically aligned opportunities are rare. This guide provides CVC teams with a structured, AI-enhanced deal screening process — from initial intake and triage, through scored assessments, to curated pipeline review.

The output is a ranked, investment-ready deal pipeline that an investment committee can act on, and an AI-assisted scoring system that removes subjective bias from early-stage screening.



THE CORE PROBLEM

Why CVC Pipelines Stall

- Deal intake is inconsistent – some deals receive deep analysis, others are passed without systematic review.
- Screening criteria are not defined in advance, allowing relationship bias to dominate decisions.
- Strategic fit is assumed but not measured – CVC teams invest in exciting companies that don't advance the parent company's strategy.
- Investment committees receive too many deals with insufficient comparative data to make ranked decisions.
- AI and automation are underused in CVC screening – analysts spend 80% of their time on data gathering, not analysis.



PREREQUISITES

- A defined CVC Investment Thesis from Phase One (venture domains, strategic intent, target stage)
- A deal intake channel: online form, email alias, or sourcing platform
- A CRM or deal tracking system (Notion, Airtable, Salesforce, or equivalent)
- Access to AI tools for research, scoring, and report generation
- A defined Investment Committee with meeting cadence and quorum requirements



EXPECTED OUTPUT/ SUCCESS CRITERIA

You Have Succeeded When:



A standardized Deal Intake Form captures all required data from every opportunity



An AI-assisted Deal Scoring Model produces a consistent score for every deal within 48 hours of intake



A curated Pipeline Dashboard shows all active deals ranked by score with status and next action



Investment Committee receives a standardized Deal Brief for every deal presented



A minimum of 3 investment-ready opportunities proceed to term sheet discussion per quarter



STEP-BY-STEP INSTRUCTIONS

STEP 1 DESIGN YOUR DEAL INTAKE FORM

1.1

Every deal entering the pipeline must submit the same information. Standardize your intake form with these fields:

FIELD	PURPOSE
Company Name + Website	Basic identification
Founding team + LinkedIn profiles	Team quality assessment
One-sentence problem statement	Thesis alignment check
Solution description (max 200 words)	Differentiation assessment
Stage (Pre-seed / Seed / Series A)	Stage fit with CVC mandate
Revenue (if any) + growth rate	Commercial traction signal
Funding sought + use of funds	Capital requirements
Strategic fit narrative (max 100 words)	Why this company for this CVC?
Referral Source	Deal quality signal – warm vs cold

1.2

Deploy the intake form via your chosen platform (Typeform, Airtable, Google Forms, or equivalent) and configure automatic routing of submissions into your CRM or deal tracking system.



STEP 2 BUILD YOUR AI-ASSISTED SCORING MODEL

- 2.1** Define your scoring dimensions and weights. Recommended framework for TURN8 CVC programs:

DIMENSION	WEIGHT / MAX SCORE
Strategic Fit – alignment with CVC thesis domains	25 / 25
Team Quality – founding team experience, domain expertise, completeness	20 / 20
Market Size – addressable market size and growth rate	15 / 15
Traction – revenue, users, growth rate, customer quality	20 / 20
Competitive Differentiation – defensibility, moat, IP	10 / 10
Financial Credibility – realistic projections, reasonable valuation	10 / 10

- 2.2** Use AI to pre-score each deal using this prompt:

AI SCORING PROMPT

"Score this startup against the following CVC thesis: [PASTE THESIS]. Startup details: [PASTE INTAKE FORM DATA]. Score each dimension: Strategic Fit (0-25), Team Quality (0-20), Market Size (0-15), Traction (0-20), Competitive Differentiation (0-10), Financial Credibility (0-10). For each dimension provide: score, 2-sentence justification, and the key risk. Total score out of 100. Recommendation: Pass / Advance to Due Diligence / Conditional Advance."

- 2.3** Every AI-generated score must be reviewed and adjusted by a human analyst before being entered into the pipeline.

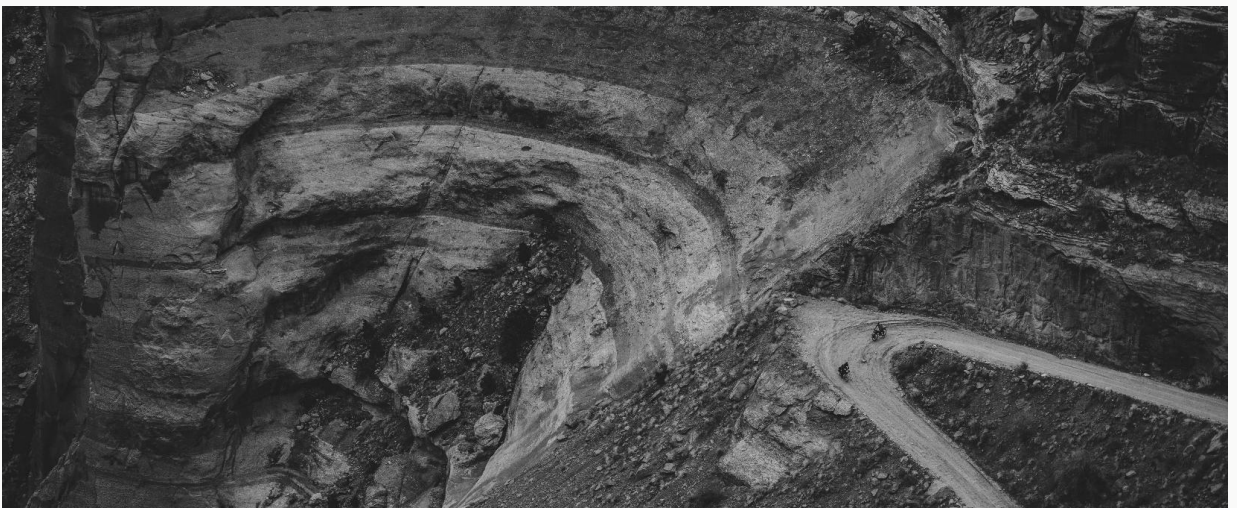


STEP 3 RUN THE WEEKLY TRIAGE PROCESS

- 3.1 Hold a 60-minute weekly triage meeting with 2–3 analysts. Review all new deals that entered the pipeline that week.
- 3.2 For each deal: analyst presents the AI-generated score and their qualitative assessment. Team votes: Pass, Hold, or Advance to Due Diligence.
- 3.3 Deals scoring above 70/100 automatically advance to due diligence. Deals below 40/100 are automatically passed. Deals scoring 40 to 69 require human discussion.
- 3.4 Send a structured 'thank you and decline' response to all passed deals within 5 business days.

STEP 4 CURATE THE INVESTMENT COMMITTEE PIPELINE

- 4.1 Deals advancing from triage enter the due diligence queue. Assign one analyst as deal owner.
- 4.2 Due diligence produces a standardized Deal Brief: 5 pages covering Team, Problem/Solution, Market, Traction, Financials, Strategic Fit, Risks, and Deal Terms.
- 4.3 Investment Committee receives a pipeline dashboard before each meeting: all active deals ranked by score, with status, deal owner, and next action.
- 4.4 Investment Committee meeting agenda: 10 minutes per deal for deals in final review, 30 minutes for pipeline overview.



CHECKLIST

INTAKE INFRASTRUCTURE

- Standardized Deal Intake Form deployed and accessible via a public link
- Form includes all 9 required fields: Company, Team, Problem, Solution, Stage, Revenue/Growth, Funding Ask, Strategic Fit, and Referral Source
- CRM or deal tracking system configured to receive intake form submissions automatically
- Deal intake channel communicated to all sourcing partners, accelerators, and ecosystem contacts

SCORING MODEL

- AI-assisted Scoring Model defined with all 6 dimensions and weights: Strategic Fit (25), Team Quality (20), Market Size (15), Traction (20), Competitive Differentiation (10), Financial Credibility (10)
- Scoring model tested on 10 sample deals before going live – analyst calibration session completed
- Pass threshold set at 40/100, Auto-Advance threshold set at 70/100
- Every AI-generated score reviewed and adjusted by a human analyst before being entered into the pipeline
- AI scoring prompt tested and refined to produce consistent, structured output

TRIAGE PROCESS

- Weekly triage meeting established with fixed time, 2–3 analysts, and 60-minute maximum
- Triage agenda followed: AI score presented, qualitative assessment shared, team votes Pass/Hold/Advance
- Deals above 70/100 automatically advanced to due diligence without debate
- Deals below 40/100 automatically passed without discussion
- All passed deals receive a structured decline response within 5 business days
- Decline response template created that is professional, specific, and leaves the door open



DUE DILIGENCE & INVESTMENT COMMITTEE

- One analyst assigned as deal owner for every deal advancing from triage
- Standardized 5-page Deal Brief template created: Team, Problem/Solution, Market, Traction, Financials, Strategic Fit, Risks, Deal Terms
- Pipeline Dashboard configured and shared with Investment Committee before each meeting
- Investment Committee meeting cadence established with quorum requirements defined
- IC meeting agenda structured: 10 minutes per deal for final review deals, 30 minutes for pipeline overview
- Minimum target of 3 investment-ready opportunities reaching term sheet discussion per quarter

