

# HOW TO **DEPLOY** **AND ONBOARD** YOUR VENTURE TEAM

Venture Team Deployment & Operational Setup

## WHERE THIS IS USED

- Venture Studio programs
- Corporate Incubators
- Accelerators (corporate or government-backed)
- CVC pre-investment transitions
- AI Studio agent deployment
- Foundry-as-a-Service engagements

## AUDIENCE

- Venture Studio Program Managers
- CEOs / Entrepreneurs in Residence
- Heads of Innovation
- CVC Portfolio Managers
- Executive Sponsors
- AI Studio Leads

## PHASE

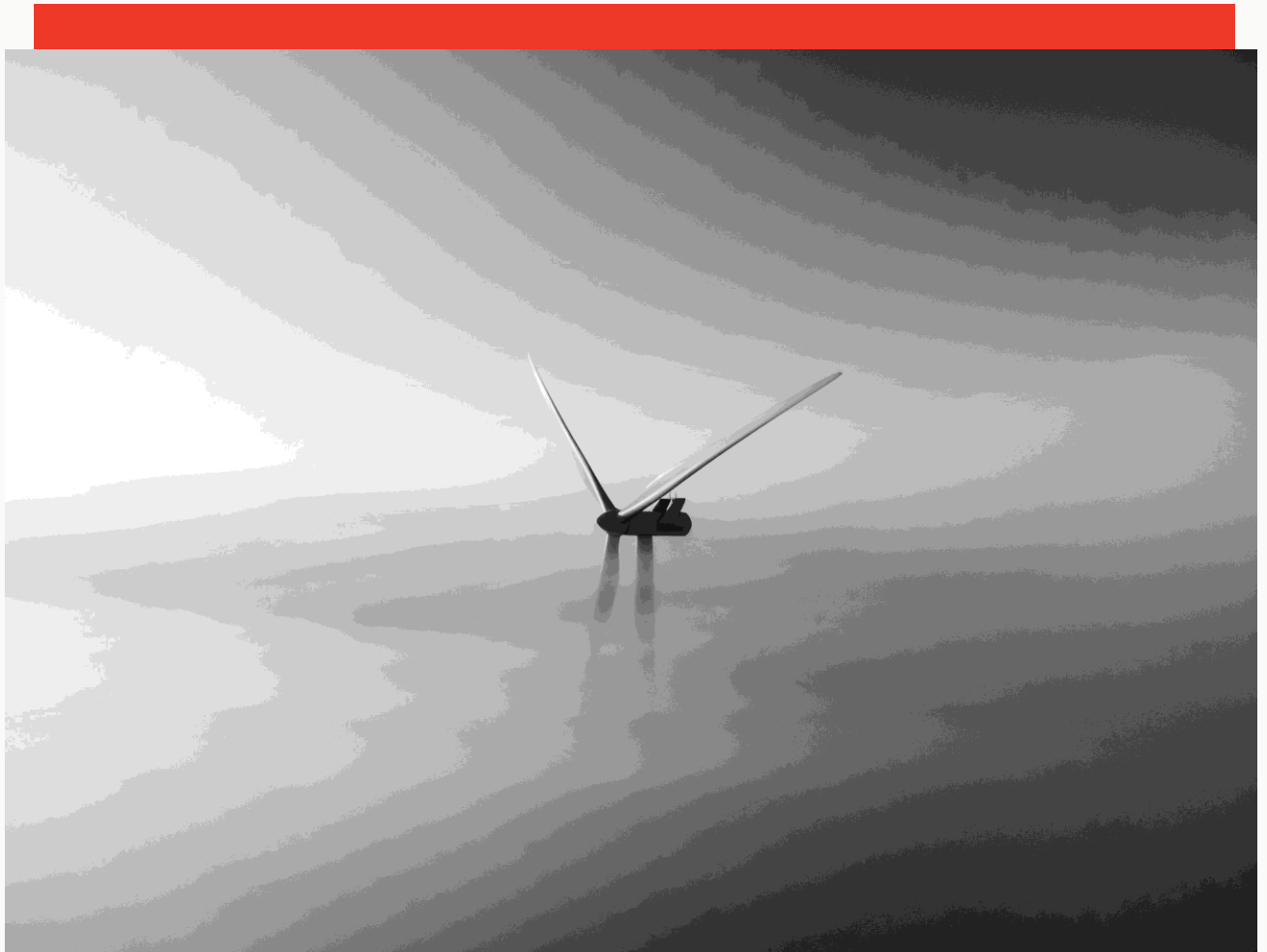
Phase Three: Build and Launch → Team Activation & Operational Setup (Days 1–10)

# EXECUTIVE SUMMARY

The most common reason Phase Three fails is not a bad product. It is a team that was never properly activated. Roles were agreed in principle but never formally confirmed. Mandate letters were verbal. The Phase Two validated learning was not transferred before building began. The Executive Sponsor committed to unlocking corporate assets, but no one followed up in writing. Three weeks into Phase Three, the team is still figuring out who owns what.

This guide moves a venture from a signed Phase Gate Decision Record to a fully functioning team — with every role confirmed by name and start date, mandate letters signed, compensation structure documented, Phase Two learning transferred in a structured half-day session, the 30-day sprint plan live in the project management tool, and the first operating cadence events booked. AI Studio agent tracks include a deployment readiness check that connects directly to Guides G1, G2, and G3. For CVC tracks, it initiates the investment execution and portfolio onboarding sequence that feeds into Guide H1.

Deployment is not an HR task. It is the operational event that determines whether Phase Three starts with momentum or starts over.



# THE CORE PROBLEM

Organizations that exit Phase Two with a strong investment decision frequently lose two to four weeks in Phase Three to an entirely avoidable problem: the team is not actually in place. Not the team that was agreed on the Phase Gate Decision Record — the team that is available, allocated, briefed, and accountable on Day 1 of Phase Three.

## The patterns are consistent across programs:

- The EIR or GM is identified but not formally assigned — still partially responsible for their previous role. Partial allocation is not startup speed.
- The Product Lead and Tech Lead are named but have not read the Phase Two MVP specification. They start with their own assumptions rather than validated evidence.
- The AI Studio Agent Lead role is absorbed into the Tech Lead or Product Lead. Weeks later, the G1 deployment preparation has not started because no one owns it.
- The Executive Sponsor signed the Phase Gate Decision Record but has not confirmed which corporate assets, customer introductions, or budget they will unlock in the first 30 days. The team discovers this gap at the monthly milestone review.
- Internal candidates are offered venture roles without a confirmed return path. The best internal talent will not volunteer for a role they cannot return from. The venture ends up with whoever was available, not whoever was best.
- Specialists are brought in at Day 1 rather than at their milestone trigger. Product engineers create pressure before customer validation is complete. The team starts defending a solution before it has been tested.
- For CVC tracks: the investment team is not formally assigned to the portfolio company until after the first capital tranche is needed. Legal close starts late. The governance gap creates risk at the worst moment.

## The underlying issue:

Deployment is treated as the conclusion of Phase Two rather than the launch event of Phase Three. When that framing takes hold, the team does not arrive ready to build — it arrives still performing the coordination work that should have been completed before Day 1.



# PREREQUISITES

## Documents and Decisions Required Before Starting:

- Signed Phase Gate Decision Record from Guide D1
- Completed Investment-Ready Venture Package from Guide D3
- MVP Specification from Guide B1
- Go-to-Market Strategy from Guide C3
- Financial Projections from Guide C2 (burn rate and tranche milestones)

## Decisions That Must Already Be Made:

- Phase Three is formally authorized – not just verbally greenlit
- Executive Sponsor is named and has confirmed their availability and resource commitments
- Legal and HR have confirmed the mechanism for full-time secondment or external hire
- CVC investment decision has been made (for CVC tracks) – this guide does not start until the deal is authorized

## Tools and Access Required:

- Project management tool (Notion, Jira, Asana, or equivalent) – set up before Day 1
- Communication workspace (Slack or equivalent) – venture channel created before onboarding begins
- AI tool access (Claude, ChatGPT, or equivalent) for all team members from Day 1
- Access to Phase Two documentation and evidence appendix



# EXPECTED OUTPUT/ SUCCESS CRITERIA

You have completed this guide when the following are true:

- ✓ Every role in the venture team is filled
- ✓ Each team member has a signed mandate letter or formal secondment agreement
- ✓ Every team member has completed the Phase Two knowledge handover session
- ✓ The 30-day sprint plan exists with named owners and a milestone for each week
- ✓ The operating cadence is documented, and the first stand-up has taken place
- ✓ The Executive Sponsor has confirmed at least three specific corporate assets they will unlock in 30 days
- ✓ For AI agent tracks: the AI Studio Agent Lead has reviewed the Phase Two agent specification and confirmed the deployment environment
- ✓ For CVC tracks: the CVC Portfolio Manager has initiated the legal close checklist and confirmed first tranche conditions



# STEP-BY-STEP INSTRUCTIONS

## STEP 1 CONFIRM THE VENTURE TEAM ROSTER

Do this before anyone starts work. A roster that exists on a slide but has not been formally confirmed is not a roster.

- 1.1 **Pull the team structure from the Phase Gate Decision Record** — Identify every named role and who provisionally fills it
- 1.2 **For each role, confirm three things:** The name of the person, the start date, and 100% dedication from Day 1 — partial allocation is not acceptable
- 1.3 **Identify gaps** — Any role that is not yet filled needs a sourcing decision: internal candidate, external hire, or TURN8-supported placement
- 1.4 **Assign an AI Studio Agent Lead if not already named** — This role owns agent deployment, integration checks, and operational handover — it cannot be absorbed into the Product Lead or Tech Lead role
- 1.5 **Confirm the CVC investment team for CVC tracks** — The Partner/Managing Director must authorize the deal; a Principal or Director must be assigned to lead the deal team and serve in board roles; an Associate should be in place to manage due diligence and portfolio tracking from Day 1

### AI PROMPT — Sourcing Gap Analysis

I am deploying a venture team for a [describe venture in one sentence]. Our confirmed roles are [list roles]. Our gaps are [list unfilled roles]. For each gap, suggest whether to source internally or externally, what profile to look for, and what question to use in a 30-minute screening conversation. Output as a table.



**STEP 2 SCREEN AND SELECT TEAM MEMBERS**

Recruiting for character matters more than skills. Poor team dynamics are the leading cause of venture failure. Screening must happen before mandates are issued – not after.

- 2.1 Run a Predictive Index (PI) behavioral assessment for all candidates** – PI helps identify comfort with ambiguity, intensity, and startup risk – not everyone is suited to venture building, regardless of their skills
- 2.2 Conduct a six-stage screening process for each role** – Recruiter (role overview, resume review) → Peer (day-in-the-life, skills deep-dive) → Manager (behavioral questions, team fit) → Guild Lead (facilitation and creative thinking test) → People Lead (culture fit, PI de-risk) → Hire
- 2.3 Use a 45-minute venture interview for final candidates** – Walk through something they created; explore their comfort with ambiguity and startup risk; de-risk any concern areas from the PI assessment
- 2.4 For internal candidates, confirm the return path before they are offered the role** – Define where they go back if the venture does not proceed beyond Phase Three: Build and Launch – without this, internal talent will not volunteer
- 2.5 Establish a rotation opportunity framing** – Position the venture role as a structured rotation – not a permanent departure. Assist the source department with temporary backfill during the Build and Launch phase

**AI PROMPT – Candidate Screening Questions**

I am screening a candidate for a [Role Title] on a Phase Three venture team. The venture is [describe in one sentence]. Based on the role requirements, generate five targeted behavioral interview questions that test: startup mindset, comfort with ambiguity, ownership orientation, and team collaboration. Avoid generic questions.



**STEP 3 CONFIRM THE COMPENSATION AND INCENTIVE STRUCTURE**

Compensation must be decided before team members are formally onboarded. The structure chosen affects equity, legal entity requirements, and how the venture is governed. There are three main models to choose from:

- 3.1 **Spin-In (100% corporate parent owned)** — No new legal entity required. The team is compensated through existing corporate structures via milestone-based cash bonuses. Simplest to administer; limits upside for team members
- 3.2 **Phantom equity / hybrid structure** — Team participates in a target pool tied to venture milestones. Provides upside without creating a new entity. More like a traditional VC incentive; requires a defined allocation between the Venture Studio and team members
- 3.3 **Spin-Out NewCo** — A new legal entity is created. Founding team receives restricted stock grants at formation. The rest of the team is on the equity incentive plan with vesting schedules. Best for attracting external talent; requires legal structuring and board governance from Day 1
- 3.4 **Document the chosen structure before issuing mandate letters** — The compensation model directly affects the mandate letter, secondment agreement, and decision rights — these cannot be finalized without it



**STEP 4 DEFINE ROLES, MANDATES, AND DECISION RIGHTS**

Every team member must know what they own, what decisions they can make alone, and what requires escalation. Ambiguity here destroys speed.

ROLE	SOURCING	CORE MANDATE	WHEN ACTIVE
<b>VENTURE STUDIO – CORE TEAM (PERMANENT STUDIO STAFF)</b>			
Operating Partner	TURN8 / external	Seasoned entrepreneur who coaches the EIR and C-level executives across the full build process; ensures effective execution	Day 1 – full duration
Venture Executive	TURN8 / external	Guides the New Venture Team through customer discovery, solution validation, and business planning	Day 1 – full duration
CX Designer / Researcher	TURN8 / external	Supports all design needs; provides quality control across Open-Ended Discovery, Value Proposition Testing, and Solution Testing	Day 1 – full duration
<b>NEW VENTURE TEAM (VENTURE-SPECIFIC ROLES)</b>			
EIR / GM / Business Owner	Internal or external	Leads the venture at startup speed; owns strategy, story, P&L, and investor relationships	Day 1
Product Lead	Internal or external	Drives and iterates product vision, roadmap, MVP, and technical feasibility	Day 1
Tech Lead	Internal or external	Defines and builds the product or service; evaluates feasibility and technical approach	Day 1
GTM / Sales Lead	Internal or external	Develops and executes competitive analysis, marketing, sales, and pricing plans to engage customers	Day 1
Subject Matter Expert (SME)	Internal preferred	Leading voice for industry nuances and market dynamics; provides domain credibility and network access	Day 1 or as needed
AI Studio Agent Lead	Internal (TURN8 supported)	Owns agent configuration, deployment readiness, workflow automation, and user enablement	Day 1 (AI tracks)
Executive Sponsor	Internal (corporate)	Sets direction, removes roadblocks, unlocks corporate assets, and holds final go/no-go authority	Day 1 – full duration

ROLE	SOURCING	CORE MANDATE	WHEN ACTIVE
<b>SPECIALIST TEAM (MILESTONE-TRIGGERED ADDITIONS)</b>			
Product / Engineering Specialist	Internal or external	Balances conceptual product vision with technical feasibility; may be one or many based on product type	Week 6 – when solutions are testing well
Finance / Business Model Expert	Internal or external (startup finance experience preferred)	Drives discipline on market sizing, business modeling, pricing, and funding requirements	Week 8 – Business Viability phase
GTM / Sales Specialist	Internal or external	Helps the team imagine how the product goes to market; "stay small and scrappy" experimentation mindset	Week 9 – Check-In presentation
Storyteller / Designer	Internal or external	Helps the venture communicate its narrative; pitch decks are stories, not data reports	When preparing board narrative
<b>GOVERNANCE &amp; ADVOCACY</b>			
Venture Board	Senior internal leaders (3-5)	Sets strategic direction, establishes guardrails, removes roadblocks, and makes the final go/no-go decision	Milestone reviews and governance gates
New Venture Champions	Internal corporate departments	Functional specialists (Marketing, HR, Finance, Supply Chain, Regulatory) aligned to the venture to unlock corporate assets	As needed throughout Phase Three
<b>CVC INVESTMENT TEAM</b>			
Partner / Managing Director	Internal (CVC)	Makes final investment decisions; leads the fund; serves in board roles; actively supports portfolio companies	IC authorization through portfolio
Principal / Director	Internal (CVC)	Leads deal team; champions deals for IC approval; serves in board roles; supports portfolio companies post-close	Deal close through portfolio
Associate	Internal (CVC)	Drives due diligence activities, deal origination, and ongoing portfolio market research	Deal close through portfolio
Analyst	Internal (CVC)	Supports market research, thesis development, and due diligence; manages operational tools and reporting	Day 1 of portfolio onboarding
General Counsel / CCO	Internal or external	Manages legal close, term sheet review, compliance, and conflict-of-interest protocols	Legal close phase
CFO (Fund)	Internal or external	Manages fund accounting, IFRS 13 fair value reporting, NAV determination, and capital administration	First tranche through portfolio

Note: Role names can be adapted to your organization's terminology. What cannot be adapted is the mandate – each function must be clearly assigned to exactly one person.

- 4.1 **Issue a mandate letter for each role** – One page: role title, reporting line, decision rights, resources available, and 30-day deliverables
- 4.2 **Confirm decision rights explicitly** – Define the three decisions each person can make independently and the two that require sponsor escalation
- 4.3 **Confirm 100% allocation in writing** – A secondment letter or employment agreement – not a verbal commitment from a manager

#### AI PROMPT – Mandate Letter Draft

Draft a one-page mandate letter for a [Role Title] joining a Phase Three venture team. The venture is [describe in one sentence]. The 30-day deliverables are [list up to four]. The decisions they can make independently include [list three]. The two decisions requiring Executive Sponsor approval are [list two]. Tone: direct, professional, founder-level accountability.

## STEP 5

### RUN THE PHASE TWO KNOWLEDGE HANDOVER SESSION

The entire Phase Three team must absorb the outputs from Phase Two before building or selling anything. A team that does not know what was validated will re-validate it – wasting weeks.

- 5.1 **Schedule a half-day Knowledge Handover Session** – Block four hours within the first three business days of team deployment
- 5.2 **Assign the handover facilitator** – This should be the person most involved in Phase Two – typically the program manager or the Phase Two lead

#### AGENDA:

- **Hour 1** – Problem statement, customer interview findings, demand signal score
- **Hour 2** – MVP specification (Guide B1 output) and prototype walkthrough
- **Hour 3** – Business model, unit economics, GTM strategy, and Customer Zero targets
- **Hour 4** – Open Q&A, assumption log review, and 30-day sprint planning

- 5.3 **Distribute the Phase Two evidence appendix** – Every team member gets access to the full documentation – not a summary slide
- 5.4 **Record the session** – Any team member who joins after Day 1 must complete the handover before their second week

#### AI PROMPT – Handover Session Preparation

I need to prepare a Knowledge Handover Session for a new Phase Three venture team. The Phase Two outputs include: [paste or summarize key findings]. Generate a structured four-hour agenda with facilitation notes, the five most important questions the team must be able to answer by the end of the session, and the three most dangerous assumptions they must not carry forward untested.

**STEP 6 BUILD THE 30-DAY SPRINT PLAN**

The first 30 days of Phase Three determine whether the venture builds momentum or burns runway on coordination. Assign every deliverable to a named person with a specific due date.

- 6.1 **Open your project management tool** — Create a dedicated Phase Three workspace — separate from any Phase Two boards
- 6.2 **Build four weekly sprint goals** — One goal per week, each owned by one person and reviewable at the weekly stand-up
  - **Week 1:** Team onboarding complete, mandate letters signed, operating rhythm set
  - **Week 2:** Customer Zero outreach launched, product sprint board live, AI agent deployment environment confirmed
  - **Week 3:** First five customer conversations held, MVP build checkpoint one passed, first pilot agreement in negotiation
  - **Week 4:** First board-ready update drafted, burn rate model confirmed, at least one pilot commitment secured
- 6.3 **Assign each sprint goal to one owner** — Not a team — one person, one deliverable, one due date
- 6.4 **Define what "done" looks like for each sprint goal** — Ambiguous milestones create false progress reporting

**AI PROMPT — 30-Day Sprint Plan**

I am building a 30-day sprint plan for a new Phase Three venture team. The venture is [describe]. The team roles are [list]. The top three assumptions we must test in 30 days are [list]. The Customer Zero target is [describe]. Draft a four-week sprint plan with one named deliverable per week per role, and a definition of "done" for each. Format as a table.



**STEP 7 ESTABLISH THE OPERATING RHYTHM**

Operating without a defined rhythm means decisions happen in corridors, blockers accumulate, and the Executive Sponsor is the last to know when something is at risk.

- 7.1 **Set the weekly stand-up** — 30 minutes, same time every week — What was completed, what is next, what is blocked
- 7.2 **Set the monthly milestone review** — 60–90 minutes, with the Executive Sponsor — Progress against 30-day plan, burn rate update, decision log review
- 7.3 **Set the escalation protocol** — Define what triggers an unscheduled call to the Executive Sponsor — do not leave this undefined

**Mandatory escalation triggers:**

- Runway drops below 90 days
- A pilot customer withdraws
- A key team member resigns
- A product assumption is disproved, which invalidates the business model

- 7.4 **Set the async update cadence** — A weekly written update posted to the communication workspace by the end of Friday — three sentences: what moved, what is blocked, what needs a decision
- 7.5 **Schedule the first board update** — Set it for Day 30 — not before — so the team has something real to report



## STEP 8

## UNLOCK CORPORATE RESOURCES AND CONFIRM SPONSOR COMMITMENTS

The corporate parent's assets are the venture's structural advantage over external startups. If they are not actively unlocked within the first 30 days, the venture operates as an independent startup with a more complex stakeholder map.

- 8.1 **Hold a dedicated 60-minute session with the Executive Sponsor** — This is not a status update — it is an asset activation conversation

Ask for:

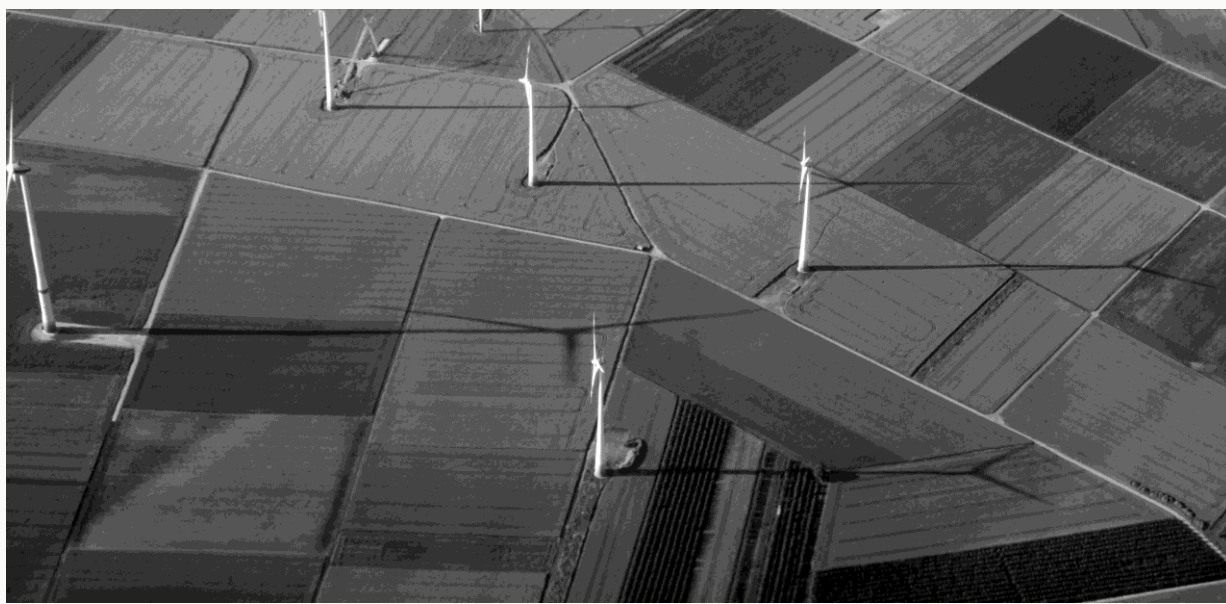
- Three specific customer introductions within 14 days
- One internal dataset or technology that the venture can access immediately
- One procurement or legal fast-lane contact
- Confirmation of the internal budget available for pilot incentives or customer acquisition

- 8.2 **Document every commitment** — Resource name, what is being provided, by when, and who is accountable for the handover

- 8.3 **Follow up in writing within 24 hours** — Unconfirmed commitments do not exist

#### AI PROMPT — Sponsor Commitment Conversation

I am preparing for a 60-minute session with an Executive Sponsor to unlock corporate resources for a Phase Three venture. The venture is [describe]. The three most valuable assets the corporate parent could provide are [list]. Draft five direct questions to ask in the session — each question should produce a specific, actionable commitment with a named owner and a deadline. Avoid vague asks like "support" or "guidance".



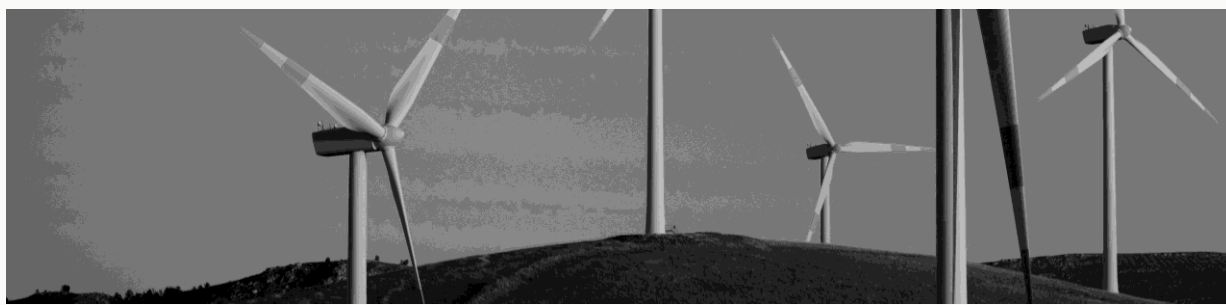
## STEP 9

## AI STUDIO AGENT LEAD: ONBOARDING AND DEPLOYMENT READINESS CHECK

For ventures that include an AI Studio agent workstream, the Agent Lead must complete a dedicated readiness check before any deployment activity begins. This is separate from the general product build and connects directly to the three G-series guides that govern AI agent operations in Phase Three.

The boundary is important: E1 establishes that the Agent Lead is in place and ready. Guide G1 (Deploy AI Studio Agents into Live Production Operations) begins the deployment sequence. Guide G2 (Enable Users and Hand Over AI Agent Operations to the Business) governs the user onboarding and formal handover. Guide G3 (Monitor, Optimize, and Report on AI Agent Performance) runs the ongoing operations cycle. None of these can start unless this step is complete.

- 9.1 **Review the Phase Two agent specification from Guide B3** – Confirm the agent architecture, workflow configuration, system prompt structure, and integration requirements are documented. The B3 output is the starting specification for G1 – the Agent Lead must be able to articulate the architecture before any production environment work begins
- 9.2 **Confirm the deployment environment** – Identify the target system, API credentials, access protocols, and any compliance or data residency constraints that will apply in production. These are prerequisites for the G1 go-live readiness checklist
- 9.3 **Identify integration dependencies** – List every external system the agent will connect to in production. Confirm access is approved – not assumed. An unapproved integration discovered during G1 deployment will delay go-live
- 9.4 **Confirm the user base and onboarding scope** – Who are the first users the agent will serve? What change management or workflow training will be required before go-live? This feeds directly into the G2 change management plan
- 9.5 **Set the agent go-live milestone in the 30-day sprint plan** – Include it in the sprint plan from Step 6 – named owner (the Agent Lead), defined environment, and confirmed rollback protocol. The G1 guide begins at this milestone



**STEP 10 CVC TRACK: INVESTMENT EXECUTION AND PORTFOLIO ONBOARDING**

For CVC tracks, the investment team must initiate legal close and portfolio onboarding in parallel with the venture team's deployment — not after. This step establishes the investment team structure and activates the legal close sequence. Guide H1 (How to Execute CVC Investment and Onboard a Venture Into the Portfolio) covers the full close sequence and first-90-days portfolio onboarding in detail — this step is the prerequisite for H1 to be executable.

The TURN8 CVC deal lifecycle: Sourcing → Screening → Due Diligence → Negotiation → Investment Committee → Legal Diligence → Deal Closing → Portfolio Management. By the time E1 begins, the venture has passed through IC. The steps below cover the transition from IC vote to a fully onboarded portfolio company.

**INVESTMENT TEAM ACTIVATION:**

- 10.1 **Confirm Partner / Managing Director authorization** — No capital moves without formal confirmation that the Phase Gate Decision Record triggers deal close. The authorization is in writing — an IC vote summary is not sufficient
- 10.2 **Assign the Principal or Director as deal lead** — This person leads the deal team, champions it through IC, and serves in the board role. Must be named before legal close begins — no deal lead means no accountability for the close process
- 10.3 **Activate Associate and Analyst** — Associate manages due diligence tracking and portfolio engagement; Analyst sets up KPI dashboards and the first reporting template from which Guide H3 quarterly reporting will run

**LEGAL CLOSE:**

- 10.4 **Confirm IC composition and process** — 3–5 executives; 48-hour turnaround capability; Investment Memo distributed at least one week before the IC meeting
- 10.5 **Initiate legal close with General Counsel** — Confirm term sheet, board seat or observer rights election, and any LPAC requirements within five business days of IC vote. The board seat decision (Director vs Observer) carries fiduciary implications — document with General Counsel before close
- 10.6 **Confirm CFO accounting treatment** — IFRS 13 fair value methodology and quarterly NAV schedule confirmed before the first capital is released. This is required input to the H3 quarterly reporting infrastructure

**PORTFOLIO ONBOARDING (POST-CLOSE):**

- 10.7 **Set portfolio engagement cadence** — Bi-weekly founder check-ins initially; quarterly board meetings with financials; monthly operational KPI updates. This cadence runs alongside and feeds the venture operating rhythm from Guide E2
- 10.8 **Onboard the venture into portfolio systems** — CRM, KPI tracking, board governance calendar, and reporting templates — all complete before first capital is released. The H2 dashboard guide builds on these systems
- 10.9 **Proceed to Guide H1 for the full close and first-90-days onboarding sequence** — H1 covers: first tranche release conditions and mechanics, the internal portfolio onboarding process, the expectations framework for both sides, and the 90-day portfolio company integration plan

# 6

## TROUBLESHOOTING

SYMPTOM	LIKELY CAUSE	FIX
EIR hired but no clear decision rights	Mandate letter was verbal, not written	Issue a signed mandate letter within 48 hours of Day 1; define the three decisions they cannot make without sponsor sign-off
Corporate SME assigned part-time and unavailable	Secondment not formally approved by their line manager	Escalate to Executive Sponsor immediately; secure a written commitment for minimum two days per week
Tech Lead and Product Lead in conflict over scope	MVP spec from Phase Two was not handed over properly	Run a half-day alignment session using the Phase Two B1 guide output as the single source of truth
Specialist added too early — team is defending a solution before it is customer-validated	Product/Engineering Specialist brought in before solutions are testing well	Remove the specialist temporarily; specialists are milestone-triggered, not Day 1 hires. Re-engage at week 6 when validation is positive
Internal candidates reluctant to join the venture	No return path was defined before the role was offered	Define and document the return path before recruiting begins — include it in the secondment agreement; without it, the best internal talent will not volunteer
CVC investment team not yet assigned to the portfolio company	IC vote occurred but deal lead not yet named	The Partner/MD must name the Principal or Director as deal lead before legal close begins — no deal lead means no accountability for the close process
AI Studio Agent Lead role undefined	AI agent was treated as a feature, not a workstream	Treat it as a dedicated role; assign an internal operator with TURN8 support from Day 1
Team members still partially on previous roles	"100% dedicated" was assumed, not enforced	Require formal secondment letters; partial allocation is a venture-killing pattern

# VALIDATION STEPS

Confirm each of the following is true before declaring team deployment complete:

Every team member can name their 30-day deliverable without referring to a document



Every team member has read the Phase Two MVP specification, not just a summary



The 30-day sprint plan exists in the project management tool – not just in a slide



Compensation structure is confirmed in writing before mandate letters are issued



Return paths are confirmed for all internal candidates



At least one customer introduction from the Executive Sponsor has been scheduled



The first stand-up has taken place, and a summary was posted to the communication workspace



**For AI agent tracks:** the deployment environment has been confirmed, and the rollback protocol is documented



**For CVC tracks:** the legal close checklist has been initiated, and the first tranche conditions are in writing

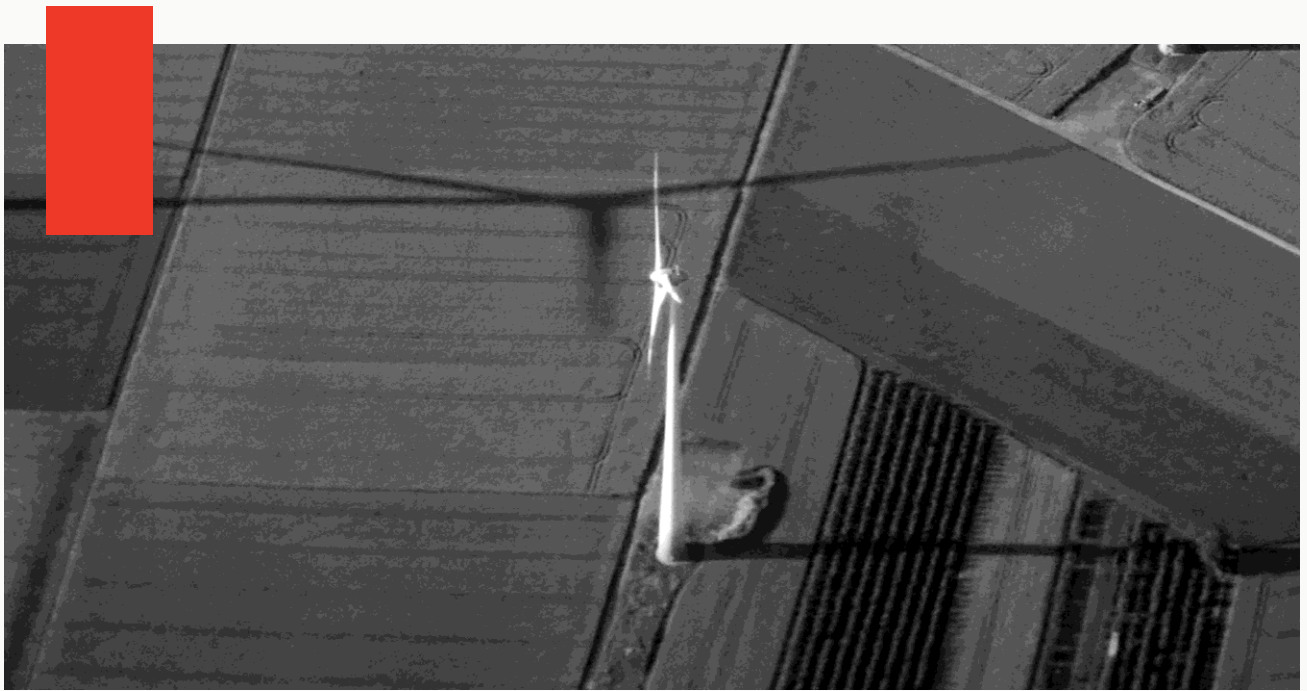


# NEXT STEPS

Upon completing this guide, proceed to these guides in parallel – they are not sequential:

- **GUIDE E2** – How to Build Your Venture Operating Rhythm and Governance Cadence (start immediately – operating rhythm must be live before F-series work begins)
- **GUIDE E3** – How to Activate Corporate Resources, Data, and Distribution (start immediately in parallel with E2)
- **GUIDE F1** – How to Run a Structured Product Development Sprint Toward an Investable MVP (begins once E1 and E2 are complete)
- **GUIDE F3** – How to Acquire Your First Customers and Build the Customer Zero Playbook (begins once E1 and E2 are complete)
- **GUIDE G1** – How to Deploy AI Studio Agents into Live Production Operations (AI agent tracks – begins at the agent go-live milestone set in Step 9)
- **GUIDE H1** – How to Execute CVC Investment and Onboard a Venture into the Portfolio (CVC tracks – begins immediately from Step 10)

The 30-day sprint plan created in Step 6 is the operational handover document from this guide to all subsequent guides. It is a live document – updated weekly, not filed away. The first weekly stand-up is the earliest possible signal of whether the deployment worked.



# MASTER CHECKLIST

## A. TEAM ROSTER

- All roles identified from the Phase Gate Decision Record
- Venture Studio Core Team confirmed (Operating Partner, Venture Executive, CX Designer/Researcher)
- EIR / GM confirmed by name with a start date
- Product Lead confirmed by name with a start date
- Tech Lead confirmed by name with a start date
- GTM / Sales Lead confirmed by name with a start date
- Subject Matter Expert confirmed with commitment level
- AI Studio Agent Lead confirmed – not absorbed into another role (AI tracks)
- Executive Sponsor named and availability confirmed
- Venture Board composition confirmed (3–5 senior leaders)
- New Venture Champions identified in key corporate departments
- Specialist Team additions scheduled by milestone – not deployed at Day 1
- All gaps identified with a sourcing decision made (internal / external / TURN8-supported)

## B. SCREENING AND SELECTION

- Predictive Index (PI) behavioral assessment completed for all candidates
- Six-stage screening process completed for each role
- 45-minute venture interview conducted for final candidates
- Return path confirmed in writing for all internal candidates before offer is made
- Rotation opportunity framing communicated to source departments
- Character and team dynamics assessed – not just skills

## C. COMPENSATION STRUCTURE

- Compensation model selected: Spin-In, Phantom Equity, or Spin-Out NewCo
- Compensation structure documented before mandate letters are issued
- Legal and HR aligned on the chosen structure
- Equity or incentive terms confirmed for founding team members

## D. MANDATES AND AGREEMENTS

- Mandate letter issued and signed for EIR / GM
- Mandate letter issued and signed for Product Lead
- Mandate letter issued and signed for Tech Lead
- Mandate letter issued and signed for GTM / Sales Lead
- Secondment or engagement agreement signed for Subject Matter Expert
- AI Studio Agent Lead mandate includes deployment environment confirmation
- All team members confirmed at 100% allocation – no partial assignments
- Decision rights defined and documented for each role

## E. KNOWLEDGE HANDOVER AND SPRINT PLAN

- Half-day Knowledge Handover Session scheduled within first three business days
- Facilitator assigned for the handover session
- Phase Two evidence appendix distributed to all team members
- Session recorded for team members who join later
- All team members can articulate the top three assumptions from Phase Two
- 30-day sprint plan built in the project management tool with named owners
- Definition of "done" confirmed for each weekly sprint goal

## F. OPERATING RHYTHM AND CORPORATE RESOURCES

- Weekly stand-up scheduled (date, time, platform confirmed)
- Monthly milestone review scheduled with Executive Sponsor
- Escalation triggers defined and documented
- Async weekly update format communicated to all team members
- Day 30 board update scheduled
- 60-minute sponsor resource session held
- Three customer introductions committed by sponsor with names and dates
- All sponsor commitments documented in writing with named owners and deadlines



## G. CVC INVESTMENT TEAM AND AI STUDIO

- AI Studio Agent Lead has reviewed Phase Two agent specification (B3) – AI tracks
- Deployment environment confirmed and documented – the prerequisite for G1 go-live readiness (AI tracks)
- Integration dependencies listed and access confirmed for each (AI tracks)
- User base and onboarding scope confirmed – feeds the G2 change management plan (AI tracks)
- Agent go-live milestone in 30-day sprint plan with named owner and rollback protocol (AI tracks)
- Partner / Managing Director has formally authorized the investment (CVC tracks)
- Principal or Director assigned as deal lead and confirmed for board role (CVC tracks)
- Associate and Analyst assigned – portfolio systems set up including H3 reporting templates (CVC tracks)
- IC composition confirmed; Investment Memo distributed one week before IC meeting (CVC tracks)
- General Counsel engaged; legal close checklist initiated; board seat decision documented (CVC tracks)
- CFO confirms IFRS 13 valuation methodology and quarterly NAV schedule (CVC tracks)
- First tranche release conditions confirmed in writing (CVC tracks)
- Portfolio engagement cadence set: bi-weekly founder check-ins, quarterly board meetings (CVC tracks)
- Guide H1 initiated for full close and first-90-days onboarding sequence (CVC tracks)

