

AI Investment Deal Screening Workflow

How it Works

This workflow automates AI-powered investment deal screening by collecting opportunities from email inboxes or web form submissions and evaluating them against your investment criteria. Incoming submissions are first normalized into a consistent format before the email content and available deal information are combined into a structured screening document.

The workflow validates that sufficient deal information exists before sending the submission to OpenAI. The AI extracts important business details such as the company name, industry, funding request, revenue, team, strengths, and potential risks. A second AI step scores the opportunity across key investment criteria including market fit, business traction, growth potential, team quality, and overall clarity.

Based on the final score, the workflow automatically classifies each deal as PASS, REVIEW, or REJECT. Qualified opportunities generate Telegram alerts with a concise investment summary, while every submission is logged to a Google Sheets pipeline for tracking, reporting, and future follow-up. This enables investment teams to review high-quality opportunities faster while eliminating hours of manual screening.

Who is this for?

- Venture Capital firms
- Private Equity firms
- Angel investors
- M&A; advisors
- Startup accelerators
- Investment analysts
- Family offices
- Anyone managing high volumes of investment opportunities

