AI-Based Investor-Startup Matchmaking Platform

Form Design Report

Objective:

To collect structured, detailed, and AI-friendly information from both startups and investors to enable intelligent matchmaking.

1. Investor Onboarding Form - Required Fields

A. Basic Information:

- Full Name

- Email Address

- Phone Number

- LinkedIn Profile

- Organization / Firm Name

B. Investor Type:

- Type of Investor (Angel, VC, PE, etc.)

- Are you an Accredited Investor? (Yes/No)

C. Investment Preferences:

- Preferred Industries / Sectors (multi-select)

- Preferred Startup Stages (multi-select)

- Investment Ticket Size (range)

- Preferred Geographies (multi-select)

- Investment Model (Equity, SAFE, Revenue Share, etc.)

- Co-Investment Interest (Yes/No)

D. Past Investment Experience:

- Have you invested before? (Yes/No)

- Number of Investments Made

- Portfolio Highlights (text or file upload)

- Portfolio Website / AngelList Profile

E. Risk & Strategy Preferences:

- Risk Appetite (Low, Moderate, High)

- Investment Horizon (Short, Medium, Long)

- Interest in ESG / Impact Startups (Yes/No)

F. Optional:

- Availability for Pitches / Meetings (multi-select)

- Preferred Communication Method (Email, Phone, Zoom)

- Additional Notes (text)

- Upload Investment Thesis (PDF/DOC)

2. Startup Onboarding Form - Required Fields

A. Basic Information:

- Startup Name

- Website / App URL

- Founder's Name(s)

- Email Address

- Phone Number

- LinkedIn Profile(s)

B. Team & Founder Details:

- Number of Founders

- Team Size

- Founder Background

- Previous Startup Experience (Yes/No)

- Key Team Skills / Roles (multi-select)

C. Startup Profile:

- Industry / Sector (multi-select)

- What problem are you solving? (long text)

- Describe your product/service (long text)

- Business Model (B2B, B2C, SaaS, etc.)

- Tech Stack Used

- Startup Stage (Idea, MVP, etc.)

D. Traction & Metrics:

- Monthly Revenue (MRR)

- Active Users / Customers

- Funding Raised So Far

- Customer Retention / Churn

- Growth Rate (monthly/yearly)

E. Funding Needs:

- Funding Amount Seeking

- Use of Funds (multi-select)

- Expected Funding Round Type

- Equity Offering (%)

- Pitch Deck Upload (PDF)

F. Geography & Expansion:

- Headquartered In

- Operating Markets

- Expansion Plan (next 12 months)

G. Optional Fields:

- Current Investors / Advisors

- Exit Strategy (if defined)

- ESG / Impact Alignment (Yes/No)

- Preferred Investor Type

- Additional Notes

Conclusion:

These forms are designed to capture all necessary data points for intelligent, AI-based matchmaking. They ensure alignment between startup needs and investor criteria across stage, sector, amount, geography, and risk preferences.