NEONVEST OPPORTUNITY SCORE · NOS

[redacted]

An AI platform automating the clinical and operational workflow around a patient visit, priced per clinic and per encounter. Raising [redacted] on a convertible note behind [redacted] already raised. Scored against the investor deck, the referral call, the Supercharger screen and the wider network.

7.2

out of 10

PASSES OUR BAR · PURSUE, BUT SETTLE THE TERMS BEFORE THE RAISE

Strongest team and deepest network fit on the board this quarter, held down by a thin revenue line and a cap below the money already in. The terms are the gate, not the company.

DIMENSION	SCORE	WHAT THE SCORE RESTS ON
Team	**8.5**	The strongest dimension. The CEO built a prior business to roughly [redacted] of revenue and has [redacted] of his own capital in. The CMO founded two care-delivery companies, and a board member ran a hospital system. No tenures given, so how long they have worked together is unverified.
Traction	**5.5**	The deployed base is real ([redacted] clinics, [redacted] patients) and a data partnership with [redacted] is a genuine wedge. But last year's revenue is small against the raise, and no ARR, retention or churn figure appears. The funnel is pipeline, not revenue.
Opportunity being pursued	**7.5**	A defensible wedge: build the payer-compliant record as the visit happens, rather than scrubbing the claim after, against [redacted], [redacted] and [redacted]. Against it: no TAM or SAM is recoverable from the deck, and the category is crowded.
Fit with our Superchargers	**8.5**	The deepest pool screened this quarter. 130 Superchargers qualify on declared digital health, AI or enterprise software, the US, and pre-seed through Series A. 79 declare all three.
Fit with our broader network	**8.5**	1,741 firms in the wider database declare healthcare software, 762 in the US, 506 at pre-seed, seed or Series A. 76 record a cheque that could lead a round this size, and 46 strategic venture arms declare digital health early.
Likelihood of a successful raise	**5.5**	What holds the composite down. A convertible note with a cap set below the capital already raised: new money asked to enter below the money before it, which lands in the first meeting. Part of the round is said to be committed; the deck does not say how much.

MOVER 1

Put retention on the page

Revenue is thin, so the evidence has to come from somewhere else. Retention, churn and revenue per clinic would turn the deployed base into proof.

MOVER 2

Confirm what is committed

If a meaningful share of the round is genuinely spoken for, likelihood moves to 7.0 and the composite to 7.5.

MOVER 3

Explain the cap, once, in writing

A cap below the capital already raised needs an answer before a fund asks. Answered credibly, the composite moves to 7.4.

Every company is scored out of 10 before neonVest takes it on, and we only take on companies that pass our bar. This sample is a real score with the company, people, partners and figures that would identify them removed.