

VC & PE Program: Mastering the Deal Life Cycle

For analysts, investors, and managers: navigate every stage from sourcing to exit with practical strategies and real cases.

Venture Capital & Private Equity Instructor: James Carter • 5 sections • 51 lessons • 16.50h total

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About this course

Understanding the full life cycle of venture capital and private equity deals is essential but challenging. Many professionals struggle with fragmented knowledge, missing key steps from initial sourcing to successful exits. This program addresses that by breaking down each phase into clear, actionable modules.

You'll learn how to source deals, perform due diligence, structure investments, manage portfolios, and plan exits through video lessons, case studies, and practical exercises. The content is designed for 2026 markets, with up-to-date examples and tools.

Course curriculum

Foundations and Preparation

- **Introduction to Venture Capital and Private Equity (12m)**
Overview of VC and PE, key differences, and their roles in the investment landscape.
- **The Deal Life Cycle: An End-to-End View (18m)**
Step-by-step breakdown of each stage from sourcing to exit, with real-world examples.
- **Key Players and Roles in VC and PE (15m)**
Understand the functions of GPs, LPs, founders, and other stakeholders in deals.
- **Market Analysis for 2026: Current Trends and Opportunities (20m)**
Explore the latest trends in VC and PE, including AI integration and new sectors.
- **Fund Structures and Operations (25m)**
How VC and PE funds are set up, including fund sizes, timelines, and management fees.
- **Legal and Regulatory Essentials (18m)**
Key laws and compliance requirements for conducting VC and PE investments.
- **Developing Your Investment Thesis (22m)**
Craft a personalized strategy based on market gaps, risk appetite, and goals.
- **Tools and Resources for Investors (8m)**
Practical tools, databases, and networks to support your investment activities.

Core Concepts

- **Sourcing Deals: Finding Promising Opportunities (15m)**
Methods to identify startups and companies for potential investment.
- **Screening and Initial Assessment (12m)**
Quick evaluation techniques to filter deals based on key criteria.
- **Due Diligence: Financial Review (25m)**
Deep dive into financial statements, projections, and red flags.
- **Due Diligence: Legal and Compliance (20m)**
Review contracts, IP rights, and regulatory compliance in deals.
- **Valuation Techniques for VC and PE (30m)**
Learn DCF, comparables, and multiple-based valuation methods with examples.
- **Understanding and Drafting Term Sheets (22m)**
Key provisions in term sheets and how to negotiate them effectively.
- **Negotiation Fundamentals for Investors (18m)**
Strategies to negotiate deal terms, equity stakes, and protective provisions.
- **Deal Structuring: Equity, Debt, and Hybrids (20m)**
Design investment structures that align incentives and manage risk.
- **Portfolio Construction Principles (15m)**
Build a diversified portfolio across sectors, stages, and geographies.
- **Risk Assessment and Mitigation (12m)**
Identify common risks in VC and PE deals and strategies to reduce them.

Deep Dive

- **Advanced Valuation: Sensitivity and Scenario Analysis (28m)**
Extend valuation skills with models that account for uncertainty and different outcomes.
- **Building Financial Models from Scratch (32m)**
Step-by-step guide to creating models for VC and PE investments.
- **Sector-Specific Due Diligence (22m)**
Tailor due diligence for tech, healthcare, and other key sectors.
- **Operational Due Diligence: Assessing Management (18m)**
Evaluate leadership teams, operational efficiency, and growth potential.
- **Deal Execution: From LOI to Closing (20m)**
Navigate the steps after term sheet signing, including documentation and closing.
- **Post-Investment Value Creation (25m)**
Strategies to add value through operational improvements and strategic guidance.
- **Monitoring Portfolio Performance (15m)**
Track KPIs, conduct regular reviews, and report to stakeholders.
- **Handling Investment Challenges (12m)**
Deal with underperformance, conflicts, and distressed situations.

Advanced Application

- **Negotiation Workshop: Case-Based Scenarios (30m)**
Apply negotiation tactics in realistic deal situations with feedback.
- **Portfolio Management Strategies (22m)**
Active management techniques to optimize returns and manage exits.
- **Exit Strategies: Planning and Execution (25m)**
Overview of IPOs, trade sales, secondary buyouts, and timing exits.
- **Case Study: A Successful VC Deal (20m)**
Analyze a real venture capital deal from sourcing to profitable exit.
- **Case Study: A PE Buyout (20m)**
Examine a leveraged buyout, including financial engineering and value creation.
- **Co-Investment and Syndication (15m)**
Work with other investors to share risk and increase deal capacity.
- **Integrating ESG and Impact Investing (18m)**
Incorporate environmental, social, and governance factors into investment decisions.
- **Technology in VC and PE: AI and Data Analytics (22m)**
Use modern tools for deal sourcing, due diligence, and portfolio monitoring.
- **Market Cycles and Timing Investments (15m)**
Understand economic cycles and their impact on VC and PE deal flow.
- **Fund Management: Raising Capital and LP Relations (20m)**
Steps to raise a fund and maintain strong relationships with limited partners.
- **Global Perspectives: VC and PE Around the World (18m)**
Explore investment trends and opportunities in different regions.

Implementation & Next Steps

- **Building Your Professional Network (12m)**
Strategies to connect with founders, investors, and industry experts.
- **Career Paths in VC and PE (15m)**
Roles from analyst to partner, skills required, and progression paths.
- **Starting Your Own Investment Fund (25m)**
Practical steps to launch a VC or PE fund, including legal and operational aspects.
- **Current Trends in 2026: Blockchain and New Asset Classes (20m)**
Explore emerging trends and their implications for investors.
- **Ethical Considerations and Fiduciary Duties (18m)**
Navigate ethical dilemmas and maintain professional integrity.
- **Continuous Learning in VC and PE (10m)**
Resources, conferences, and communities for ongoing education.
- **Mock Deal Simulation: Full Cycle Practice (40m)**
Simulate a complete deal from sourcing to exit with guided exercises.
- **Sector Deep Dive: Technology Investments (22m)**
Focus on tech startups, trends, and investment criteria in 2026.
- **Sector Deep Dive: Healthcare and Life Sciences (22m)**
Invest in healthcare innovations, regulatory hurdles, and market dynamics.
- **Fund Performance Analysis and Benchmarking (18m)**
Measure fund success using metrics like IRR, TVPI, and benchmarks.
- **Legal Updates for 2026 (15m)**
Recent changes in laws affecting VC and PE investments.
- **Investor Relations and Communication (12m)**
Effectively communicate with LPs, boards, and portfolio companies.
- **Personal Development: Soft Skills for Investors (10m)**
Enhance negotiation, leadership, and decision-making skills.
- **Capstone Project: Apply Your Knowledge (30m)**
Complete a project to demonstrate mastery of the deal life cycle.

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