

INVESTMENT READINESS ROADMAP

A SHORT USER GUIDE



-BRIDDHI

Scaling Impact Enterprises
of Bangladesh

What is the “Investment Readiness Roadmap”

- › It is a systematic **toolkit** to support **impact entrepreneurs** on their journey towards **investment readiness** and their ability to raise repayable capital from investors.
- › It deepens and extends the basic “**Investment Readiness Check**” which is part of the **online course “Access to Impact Investment for Social Enterprises”**. This course was developed by the Social Finance Academy and VIVA Idea and was trained onsite with Impact HUB.



<https://courses.socialfinanceacademy.org/dashboard/welcome> (access to free course after registration)

How we understand “Investment Readiness”

- › If an impact enterprise intends to raise capital from investors, then it must have **the capacity and capability to seek, take on, use, and repay this investment.**
- › Investment readiness is not only a goal that enterprises need to achieve to attract investors. It is also **a way of internally preparing to successfully run the organization and scale its impact.**



Find more about the term „Investment Readiness“:
<https://social-finance-academy.org/investment-readiness/>

Who can – and should – use the “Investment Readiness Roadmap”



Impact Entrepreneurs



Incubators, Accelerators
Mentors & Consultants



- › **Impact entrepreneurs** for grasping the key concept and process of investment readiness and using it for (continuous) self assessment and learning.
- › **Mentors of impact entrepreneurs** as a guiding tool for providing their support.
- › **Incubators, accelerators and other service providers** for their one-on-one consulting or cohort training of impact entrepreneurs.

How the “Investment Readiness Roadmap” is structured (1)

The Roadmap starts with this first element:

› A **40-point questionnaire** split amongst 5 key dimensions:

- › The Social Problem
- › The Solution & Impact
- › Market & Distribution
- › Growth & Scaling
- › Financing & Forecast

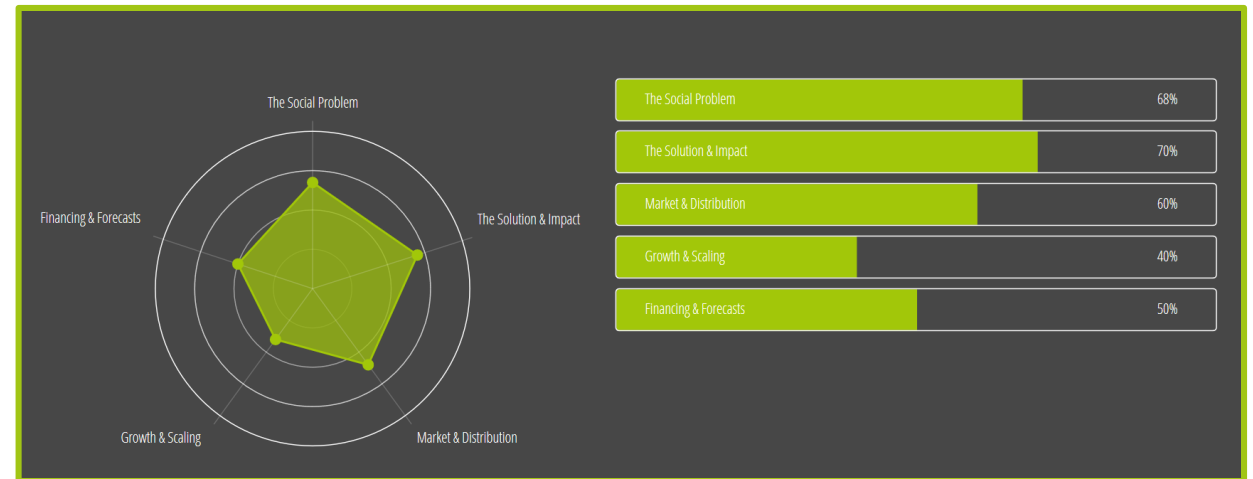


› These 5 dimensions are **the essential investment readiness ingredients** of an impact enterprise – for entrepreneurs and potential investors alike

How the “Investment Readiness Roadmap” is structured (2)

The Roadmap concludes with this core element:

- › A structured and **targeted series of outputs**:
 - › The user’s personal 5-dimension spider web
 - › The user’s overall score out of 40
 - › A visual of the score, the ability to look at each question, and a PDF for download
 - › Content and resource recommendations - **from curated articles to entire toolkits and courses** - for each question and each score level



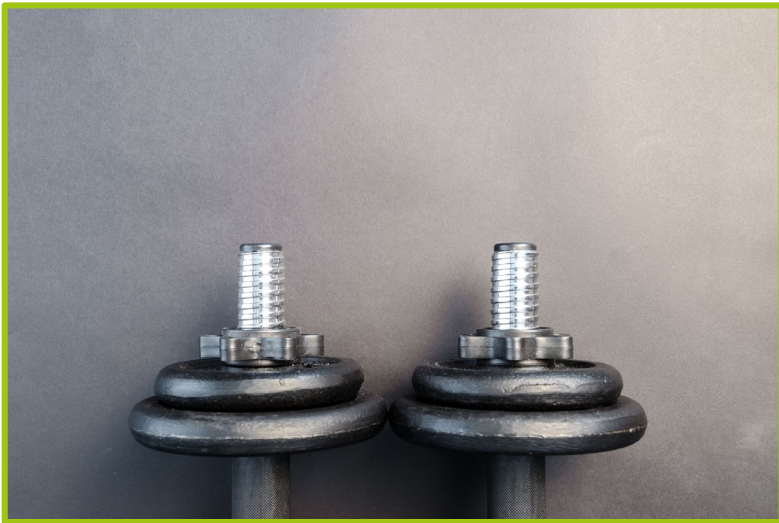
An example „spider web“ result graph from the Investment Readiness Roadmap.



Are you eager to get familiar with the framework before you dive into the Roadmap? Check out our free entry level „**Investment Readiness Check**“ and two other check tools for entrepreneurs here:

<https://social-finance-academy.org/our-check-tools/>

What you can expect from the “Investment Readiness Roadmap”



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- › A simple, **easy-to-use framework** to help users understand where they currently are on the path to raising investment and which capacities they need to focus on, build and deepen.
- › A **practice-driven, non-academic, “light-touch” tool** with credible, curated resources to help impact entrepreneurs grasp the key components of investment readiness.
- › A highly systematic approach to **self-study or train others** with a rich set of tools, know-how, templates and guidance on how to be more investor-ready.

Which unique support you will get from the “Investment Readiness Roadmap”



Full version with individual recommendations to become available around **August/September 2020**



- › An individual guide with **targeted, curated resources** showing you how to improve - based on your identified needs.
- › Practice-driven, **step by step** recommendations by seasoned experts
- › State-of-the-art Investment Readiness wisdom and content from **reliable, experienced, international sources**, enriched with important tips for impact entrepreneurs across the globe how to deal with COVID-19 and crisis situations
- › **From light to heavy content formats** - insightful articles & infographics, latest research studies & books, full online courses, effective toolkits & templates.

How to use the “Investment Readiness Roadmap”



Impact Entrepreneurs

- › Answer the questions **honestly** and to the best of your knowledge, and think of the exercise as part of your journey
- › Use the tool’s guidance to understand **key terms**
- › Be aware of the fact that **you don’t need to achieve a perfect score in all categories** to be able to attract investors. Consider it as a way to continuously build the capacity of your organisation to create impact and to be successful and sustainable, and as a means to improve your chances to attract, secure and keep investors committed.



Incubators, Accelerators
Mentors & Consultants

- › Encourage the **impact entrepreneurs you support** to understand the framework that the tool is built on and to use the tool repeatedly to test their progress.
- › Use the tool as a **systematic approach to investment readiness** to frame and complement your support offer.
- › Contextualize the tool to your local ecosystem by adding targeted training components and additional resources that reflect e.g. the specific impact sector, region or stage of your trainees, cohorts or mentees.



Curious? Try it out!

A demo version with all question, answers and the spider web result can be found here:

<https://social-finance-academy.org/package/investment-readiness-roadmap/>

Full version with resources and recommendations to become available around August 2020!