

INVESTMENT READINESS ROADMAP

QUICK USER GUIDE



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 HUBs.
- > The Investment Readiness Roadmap was initially developed for the **B-Bridddhi** program.



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 IR Roadmap is structured: THE SURVEY

The Roadmap starts with this first element: **THE SURVEY**

› 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 IR Roadmap is structured: THE RESULTS

The Roadmap concludes with the second and core element: **THE RESULTS**

- › A structured and **targeted series of outputs**:
 - › The user's personal **5-dimension spider web & table** with the user's scores in each dimension
 - › An overall feedback and recommendation based on the user's results in each dimension
 - › Curated resources for the user to self-study for progress - **from curated articles to entire toolkits and courses** - tailored to the questions and scores in each subcategory (= topics).

Recommendations

I. SOCIAL PROBLEM II. THE SOLUTION & IMPACT III. MARKET & DISTRIBUTION IV. GROWTH & SCALING V. FINANCING & FORECASTS

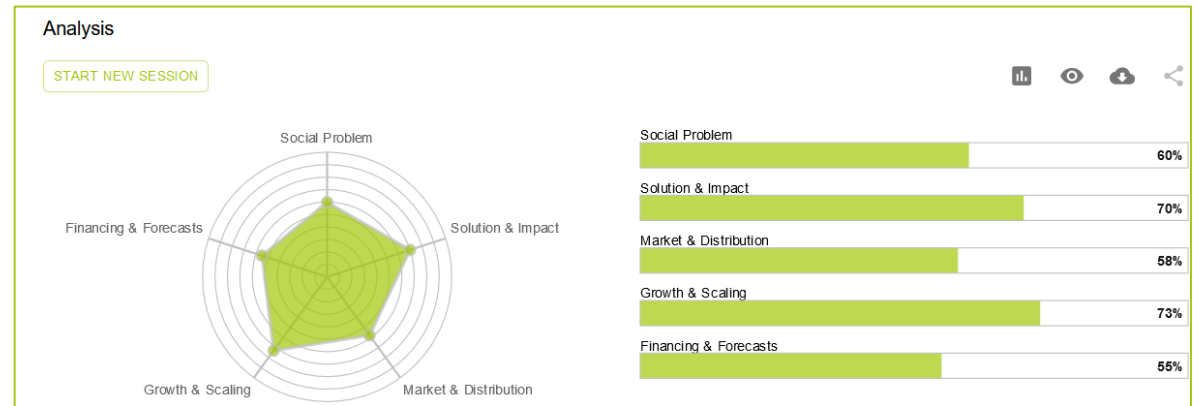
Very good: your understanding of the social problem is at an intermediate level. But please do not stop here: There is much more to discover around important subjects such as the Theory of Change, root cause analysis, customer discovery, ecosystem analysis, user persona, or SWOT. Dive into our recommended resources below to become an advanced practitioner and reach investment readiness!

Problem Open

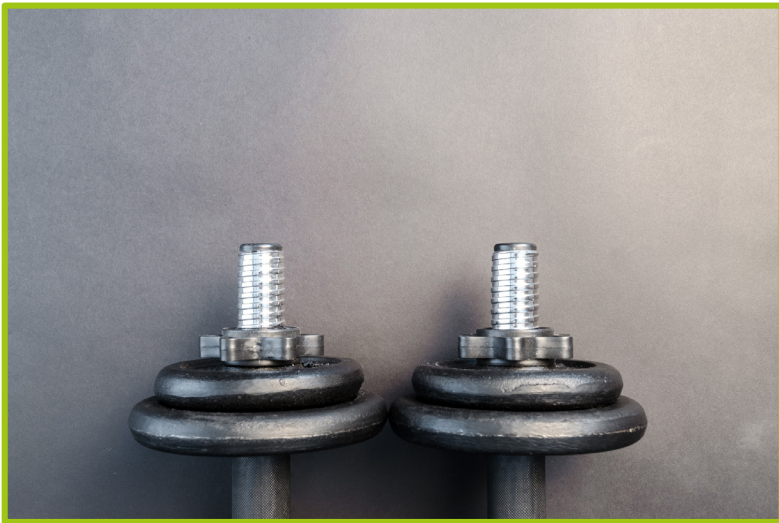
Problem Definition Framework

A simple framework to help you think through the social or market problem by focusing on key issues.

Title	Type	Actions
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What you can expect from the “Investment Readiness Roadmap”



Impact Entrepreneurs



Incubators, Accelerators
Mentors & Consultants



- > 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 (with) others** using a rich set of tools, know-how, templates and guidance on how to be more investor-ready.

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.

A pair of red roller skates with yellow laces is positioned on a wooden deck. The skates are the central focus, with their four wheels and metal frames clearly visible. The background is a blurred wooden structure, possibly a railing or part of a building, creating a sense of depth. The lighting is soft, highlighting the texture of the leather and the wood.

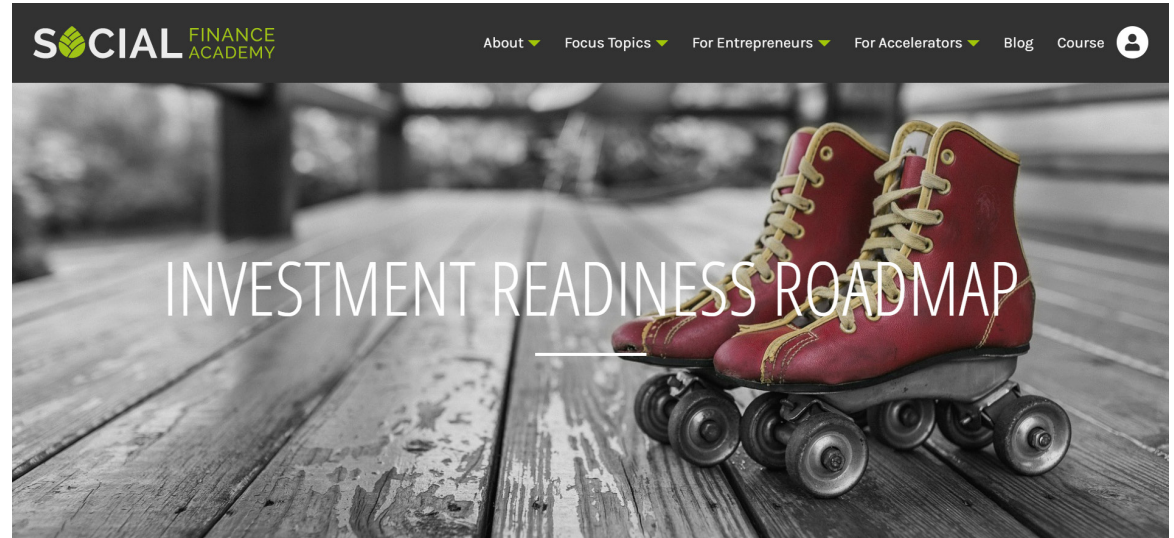
WANT TO TRY IT OUT? HERE ARE
THE "HOW TO" DETAILS!

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

How to enter and start the IR Roadmap (I)

IMPORTANT: The IR Roadmap is currently only accessible for participants of the [B-Bridddhi program](#).

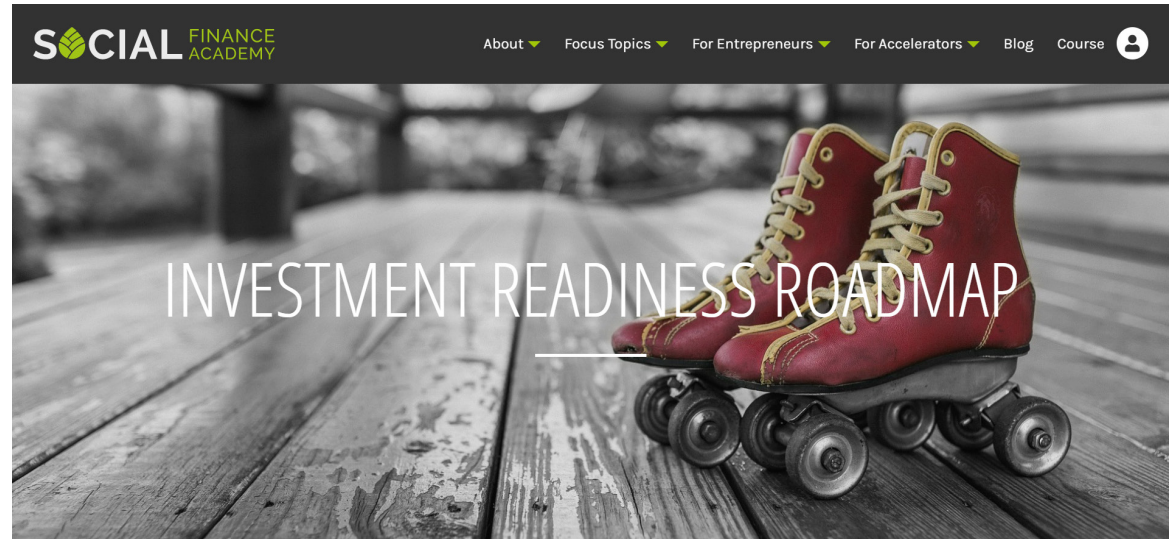
If you are part of this program, we have pre-registered you with the same email address that you use for the B-Bridddhi program communication. You will receive an email with a [one-time link from us](#) that guides you directly into the IR Roadmap tool.



How to enter and start the IR Roadmap (II)

If you want to actively request a **one-time link**, for example for another session, you can also go **directly to the IR Roadmap page** and enter your pre-registered email address here.

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



Ready to start? Enter your pre-registered email address and enjoy your learning journey!

E-mail *

I AGREE TO THE [TERMS OF SERVICE](#)

A one-time login link will be sent to your e-mail. If you prefer login with password you can set your password in your profile page once logged in.

GET LINK

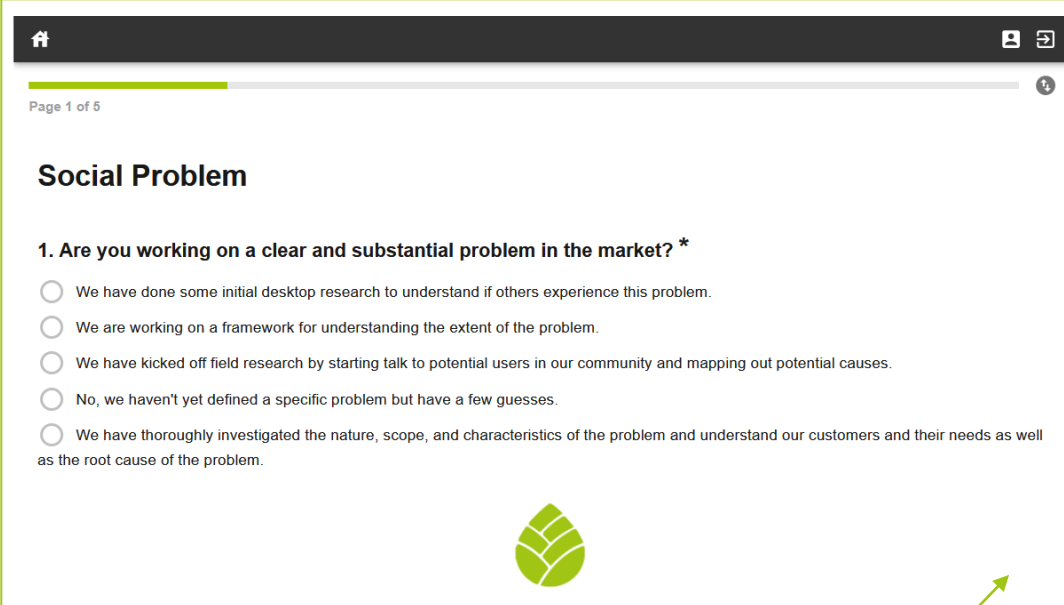
The SURVEY Page

Start the evaluation:

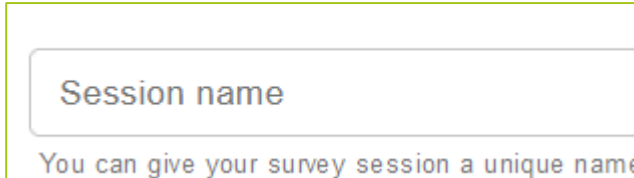
You will start with the **first question out of 40 questions in total, organized by 5 dimensions**, beginning with „Social Problem“. Only one answer per question.

Please take your time and answer as honestly as possible, this will allow you to achieve the best learning outcome.

You can give this session a name, if you like. Otherwise, it will be saved under the relevant session date.



The screenshot shows a survey interface with a dark header bar containing a home icon and user profile icons. Below the header is a progress bar and the text "Page 1 of 5". The main content area is titled "Social Problem" and contains a question: "1. Are you working on a clear and substantial problem in the market? *". There are five radio button options: "We have done some initial desktop research to understand if others experience this problem.", "We are working on a framework for understanding the extent of the problem.", "We have kicked off field research by starting talk to potential users in our community and mapping out potential causes.", "No, we haven't yet defined a specific problem but have a few guesses.", and "We have thoroughly investigated the nature, scope, and characteristics of the problem and understand our customers and their needs as well as the root cause of the problem." A green leaf icon is centered at the bottom of the survey area.



The screenshot shows a text input field with the placeholder text "Session name". Below the input field is a small text note: "You can give your survey session a unique name".

The RESULTS Page - Top

Track your progress: compare current results against single or multiple previous surveys you did.

View or print your survey result: recap how you have answered the 40 questions of the survey.

Analysis

START NEW SESSION

Category	Score
Social Problem	60%
Solution & Impact	70%
Market & Distribution	58%
Growth & Scaling	73%
Financing & Forecasts	55%

Navigation icons: [Bar chart], [Eye], [Download], [Share]

The RESULTS Page – Scroll Down

Summary feedback how you scored in this dimension

Click to open one of the 5 dimensions and read the recommendations and resources.

Download all recommendations and resources incl. links from all 5 categories

Recommendations

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Title	Type	Actions
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The RESULTS Page – Scroll Down

Click to open all recommended resources under this subcategory

Each of the 5 dimensions has several subcategories with specific topics to study on

Problem	Close <input type="checkbox"/>
Problem Definition Framework	▼
Root Cause Analysis for Beginners	▼
Root Cause Analysis Template	▼

Impact	Open <input type="checkbox"/>
Problem Tree Analysis	▼
UN Sustainable Development Goals	▼
Sustainable Development Goals Business Indicators	▼
Sustainable Development Goals Tracking	▼





Any questions? Enjoy your learning journey!

If you have any queries, please feel free to reach out to us: info@social-finance-academy.org