

Executive Summary Guidelines

The only purpose of an executive summary at CCBC is to give potential investors enough information to get them to want to find out more, at which stage you will get a chance to go into the details.

Please note: many of our investors get several investment opportunities every day which is why yours needs to stand out and quickly hook them in. In this instance less is more.

Also, this document may well be sent out to others within our network, which is why we encourage you not to put any information on it that you deem sensitive.

The following are simply guidelines and not an absolute formula of what to include. Clearly, the more fact based data you include (actual trading figures and agreements in place rather than speculative projections), the more chance you have of getting investors interested.

What are you looking for?

Outline the opportunity straight away in one sentence.

How much are you looking for? What will it be used for?

Questions to consider

- How much funding do you need?
- Why should someone invest in this?
- Have you already received Grant money?
- Is it SEIS/EIS registered? (If based in the UK)
- How much of your own money has been invested in this?
- What is the total length of time you are seeking this investment for? / What is your exit strategy?
- Are you looking for investors with experience in the sector? (Do you want an active or passive investor?)
- Why is this better than the hundreds of other opportunities the investor sees?

What is/are the problem(s) your company solves & your current market positioning?

Write in a few lines about what the opportunity is, what problem you solve and why you have the edge over your current competitors.

Questions to consider

- What problem do you solve and who is/are your target audience?
- Which other companies already offer similar solutions and what problem do you solve that they don't?
- What advantage does your company have over the competition?
- Do you have any other investors on board yet?
- Have you invested any money in this business so far?

Company / Solution

Here write something about the company and the facts:

Questions to consider

- Which country is the company based in?
- Are you already operational and if not by when do you plan to be?
- Are you already profitable and if not, by when do you plan to be?
- What strategic alliances do you already have in place?
- Have you any pre-agreement/pre-sales yet?
- Do you have any patents/Intellectual Property?

Management Experience

Write here a bit about the people in the management team.

Questions to consider

- What are the total years of MANAGEMENT (not industry) experience of your team? Give brief profiles of the team.
- What predisposes your team to tackle the problem?
- Are your team members connected to potential customers, suppliers or other important stakeholders?
- Why are your team uniquely positioned to exploit this market?

If you have any questions, please contact me on ahans@ccbconsultants.co.uk. We look forward to receiving your executive summary.