

## CCIC INVESTMENT PROPOSAL OUTLINE

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Use this template to outline your project so that you are ready to present to the Cortes Community Investment Coop. It is also useful in preparing to attract other financing, or grant applications.

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### NAME OF BUSINESS OR ORGANIZATION

This is where you wow us with your **awesome name!**

### WHAT SOCIAL PROBLEM ARE YOU ADDRESSING?

A good problem definition goes beyond a description of what problem is being solved with your business. It offers various **relevant statistics** that explain the social issue and emphasizes its relevance. Consider historic roots and local context. Be specific about what you can solve and what goes beyond the scope of your enterprise.

**Who are your beneficiaries?** The more concrete numbers you can put on your target group, the better. Sometimes you will only be able to give rough estimations, but try to be as specific as possible and make sure you have good reasons for your assumptions (e.g. reliable, official data).

Include a **competitive analysis** if possible. Since you are acting in a business environment, it might be that even for your social issue there are alternative remedies. Thus, a clear definition of your fellow competitors is important. Part of a competitive analysis is to understand what other services or products are being offered and under what circumstances. A simple table can be helpful to give a good overview of the competitive situation.

By the end of this section, your audience should be able to accurately visualize what is the problem you aim to cure with your solution & who will benefit from your solution.

## WHAT IS YOUR SOLUTION?

**What overarching goal do you have?** What factors drive you? Do you have a clear vision of where you want to be with this project in five years? Assessments regarding the future usually encompass both personal motivation and vision as well as technical questions such as how detailed have you considered expansion scenarios or who could be future partners.

**What makes your offering different from others?** Why will it be successful on the market and what leads you to this assumption?

How verifiable is your impact or value-add? Your enterprise needs to be relevant, comprehensible, and trackable. Take time to define your **Key Performance Indicators (KPIs)** with which you can measure the social impact of your company. A good tracking of the effectivity of your offering will improve your chances to be perceived as a reliable, change-making company.

## IMPLEMENTATION

What business model will you be using? How will you transition your plan into a real business? How strong is your organizational structure? Who are your partners and collaborators? This is a community focused investment group that places strong value on teamwork. Your team needs to have a common understanding of where they are heading and a clear structure of who is doing what.

## GET SPECIFIC.

- Have you experimented with a pilot project or prototype?
- Is your idea scalable?
- What is your distribution plan?
- How are you using your available resources (raw materials, staff)?

- What strategic alliances are you building?
- What is your marketing strategy?
- How will you ensure a consistently a good product or service?
- Will you be able to manage risks and challenges as they arise?
- How quickly will you be able to pay back investors?

By the end of this section, our investors should be able to understand clearly how you plan to implement your solution and who you will be working with to make it happen.

## **NOW IT'S TIME TO TALK ABOUT FINANCING.**

Growing your business means professionalizing it, which includes financial planning and investment requirements.

### **YOUR FINANCIAL PROJECTIONS**

Provide an overview of your current revenues, donations, costs, etc. Then provide a five year plan that takes into account possible growth needs (equipment, space rental, travel)

### **CAPITAL REQUIREMENTS**

- Where will you spend your money?
- How much income do you plan to generate?
- How much money you need for your business to operate?

No matter what your capital requirement is, you should feel 100% comfortable with it and have good answers available.

## COMMUNITY SUPPORT

Your presentation should take about 20 minutes. Be prepared to answer any questions that our investors might have for you.