



Matchmaking Checklist

 Objective: Ensure SMEs are well-prepared for investor matchmaking meetings, both in-person and online. This checklist helps advisors and SMEs cover the essentials.

Core Preparation Checklist

- Company profile (One-Pager) updated and ready to share.
- Pitch deck reviewed (content clear, visuals clean, aligned with ask).
- Financial documents prepared (Cap Table, Funding Plan, basic forecast).
- Due Diligence Factsheet completed (team, traction, IP, financials).
- Investor mapping updated: know who you are meeting and why.
- Internal rehearsal: practice the 5–10 min pitch.

Appendix – Investor Meeting Etiquette

- Be punctual → join calls or meetings on time, test technology in advance.
- Dress appropriately → professional but adapted to context.
- Listen actively → do not interrupt, take notes, respond concisely.
- Follow up → send a short thank-you email within 24h.