



Quick Start Guide for Advisors

🎯 Objective: Help EEN Advisors quickly understand how to use the IRS Toolkit (Ready4Invest).

1. Entry Point – Investment Readiness Scorecard

- SMEs complete the self-assessment online.
- Advisor receives automated report with scores, gaps, and recommendations.
- This determines which Toolkit modules to activate.

2. Toolkit Modules Overview

- Module 2 – Pitching & Business Model → One-Pager, Pitch Deck, Investor FAQ, Deck Quality Checklist.
- Module 3 – Financial Readiness → Cap Table, Funding Plan Canvas, Financial Forecast.
- Module 4 – Investor Outreach & Matchmaking → Investor Mapping, Email Templates, Matchmaking Checklist, Due Diligence Factsheet.
- Module 5 – Delivery & Support Tools → Quick Start Guide, Workflow Diagram, Delivery Log, Success Case Summary, Investor Resources.

3. When to Use Each Module

- If Scorecard shows weak business model → start with Module 2.
- If Scorecard highlights financial gaps → use Module 3.
- If SME shows medium/high readiness → move to Module 4.
- Always use Module 5 for reporting and consistency.

4. Advisor Role

- Guide the SME through relevant tools.
- Provide light-touch feedback (not consultancy).
- Record usage in the Toolkit Delivery Log.
- Collect outcomes and report via Success Case Summary.

5. Key Principles

- Keep it simple → tools are light, not heavy consulting.
- Consistency → use standard templates across EEN2EIC.
- Transparency → explain purpose to SMEs.
- Confidentiality → protect SME data.