




Quick Start Guide for Advisors

 Objective: Help EEN Advisors deliver harmonised Investment Readiness Services under the EEN2EIC project through the Ready4Invest Toolkit.

The Ready4Invest Toolkit has been developed within the EEN2EIC project to support the consistent and harmonised delivery of Investment Readiness Services across the Enterprise Europe Network. The Investment Readiness Scorecard serves as the entry point to a broader support pathway, helping advisors identify company needs and activate the most appropriate tools and services.

1. Entry Point – Investment Readiness Scorecard

- SMEs complete the self-assessment online.
- Advisor receives an automated report with scores, gaps, and recommendations.
- The results help identify strengths, weaknesses and priorities.

This determines which Ready4Invest Toolkit modules should be activated to support the SME through its investment readiness journey.

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.