



Designing the Ideal Investor Scorecard

This scorecard can be used to evaluate search fund investors – this can be included on part of the website & our pitch to candidates on why they should choose us

#	Attribute	Description	Score (1-3)
Reputation			
1	Brand Credibility with the Market	The Investor's brand will help you alleviate concerns around your ability to commit capital to a deal	
2	Reliability	Investor has a strong reputation of maintaining commitments made to searchers, investors, and other stakeholders, including but not limited to; capital commitments and funding, individual support, governance decisions, etc	
3	Responsiveness	Investor has a strong reputation of responsiveness. You can guarantee they will respond within 24 hours. The investor understands how important this is to you	
Acumen			
4	Board Participation	Investor is willing to sit on your board or help you source an A player for your board	
5	Investment Track Record	Investor has a proven track record of successful investments and returns in multiple industries and strategies. They have expertise and a willingness to make the investments required for transformational growth via organic and/or roll-up strategies	
6	Search Track Record	Investor has a succesful and measurable track record of successful investments in search	
Support			
7	Resources	The investor provides robust support across all phases of the search journey—from broker introductions, deal databases, and diligence SOPs to capital raise guidance and cost-saving technologies. Post-acquisition, they offer deep operational resources, including functional best practices across finance, marketing, IT, business intelligence, and pricing, as well as industry expertise in business services, technology, healthcare, education, and more	
8	Educational Community	Access to quality in-person and virtual educational programming such as searcher accelerator events, CEO cohorts, function-specific cohorts	
9	Operating Expertise	Proven access to deep bench of former and current operators willing to listen to your problems and share experiences that will help you find solutions	
10	Cultural Fit	I can be safe and vulnerable with this person. We operate at the same pace and I believe this organization has my best interests at heart	
Total			-