

## Investment Evaluation Rubric for Written Business Plan

Investment Opportunity: \_\_\_\_\_

Panelist ID: \_\_\_\_\_

←----- Scoring ----->										
10	9	8	7	6	5	4	3	2	1	0
Exceeds Expectations	Meets Expectations			Below Expectations			Little Value	No Value		

<b>Clarity &amp; Quality of the Written Business Plan</b> (10% of total score)	<b>Score</b> <b>(1-10)</b>
Product or service is clearly stated early in the Plan	
Funding request & equity offered is presented early in the Plan	
Plan is well-written and well-organized	
Plan is professional in appearance	
Lack of errors (typos, grammar, spelling)	

<b>Market Analysis</b> (17% of total score)	<b>(1-10)</b>
Concept is original and innovative	
Target market is clearly defined	
Total target market size is estimated	
Data is relevant to the target market	
The competitive environment is discussed	
Competitors & competitive products/services are identified	
Projected market share is stated and is reasonable	
Data used is meaningful, believable, and sources are documented	

<b>Financial Analysis</b> (33% of total score)	<b>(1-10)</b>
Startup costs are identified	
Variable & fixed costs are clearly identified	
Projected revenues pass the "common sense" test	
Target market data supports projected revenues	
Projected operating costs make sense	
Projected Cash Flow is supported by data	
Projection is far enough into the future to show a profit	
Plan clearly shows what ROI the Venture Capital group can expect	
The expected ROI is realistic & believable	

**Note:** This, the Written portion of the total score, is valued at 60 points, or 60% of the total score.  
The Presentation portion, to be used on the day of the presentations, is valued at 40%.



## Investment Evaluation Rubric for Oral presentation

Investment Opportunity: \_\_\_\_\_

Panelist ID: \_\_\_\_\_

<b>Scoring</b>										
←-----										----->
10	9	8	7	6	5	4	3	2	1	0
Exceeds Expectations	Meets Expectations		Below Expectations			Little Value		No Value		

<b>Oral Presentation</b> (40% of total score)	<b>Score</b> (1-10)
First impression - posture, confidence, etc.	
Team is dressed professionally	
Presentation is convincing	
Presentation sold you on investing in it	
Presentation is clear & concise	
Evidence of teamwork in presentation	
Team demonstrates maturity & professionalism	
Effective use of visuals and multimedia	
Smooth transitions from one presenter to the next	
Quality of answers to questions from the panel	
All team members must participate	
Length within guidelines of 15 minutes	

<p><b>Should E Squared Venture Capital consider investing in this business?</b></p> <p>Yes _____ No _____</p>
---

**Please note primary strengths and weaknesses you observed**

Investment opportunity: \_\_\_\_\_ Panelist ID: \_\_\_\_\_

**Strengths**

**Weaknesses**