

# STEP 7: Meet Potential Investors

## Action Items

### Checklist

	Status?	Target Date?	Responsibility?
<b>1. Look creatively and widely for potential investors, through:</b> <ul style="list-style-type: none"> <li>• personal referrals</li> <li>• social and industry gatherings</li> <li>• formal letters</li> <li>• “cold calls”</li> <li>• networks, professional groups or associations, business contacts, economic development organizations, and so on.</li> </ul>			
<b>2. Anticipate the first meeting.</b> <ul style="list-style-type: none"> <li>• Begin developing and rehearsing your presentation.</li> <li>• Organize yourself in advance: agenda, location, equipment, handouts, etc.</li> </ul>			
<b>3. Consider two points of view: the investor’s and yours.</b> <ul style="list-style-type: none"> <li>• Anticipate the investor’s needs.</li> <li>• Identify you own questions and issues for the</li> </ul>			

meeting.			
<p><b>5. Manage the meeting effectively.</b></p> <ul style="list-style-type: none"> <li>• Remember to follow through on your preparations.</li> <li>• Be observant and respond to the investor's reactions.</li> <li>• Carry out a post-meeting assessment with your team.</li> </ul>			
<p><b>6. Anticipate and understand the due diligence review.</b></p> <ul style="list-style-type: none"> <li>• Expect the investor to begin due diligence early.</li> <li>• Be open, not defensive.</li> <li>• Recognize that due diligence is a positive sign.</li> </ul>			