

# The Social Blueprint Toolkit: SBP Startup Executive Summary Overview & Template

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**Jorge Calderon**

Managing Director, Impact Strategy Advisors

**Executive Summary: Company Name**

Short pithy sentence describing your business and your anchor objective &lt;SBP.C: Anchor Purpose&gt;

**Investment Snapshot****Company Profile**

Founded	Month Day, Year
HQ Location	Primary City, State of Company
Staff Size	# Full Time Equivalent
Industry	Primary Commercial Industry Name

**Financing**

New Capital Need	Total \$'s Company is Currently Raising
Funding Round	# of "Rounds" of investment to Date
Capital Raised	Total of \$'s Raised From Inception
Pre-\$ Valuation	Valuation Before New Financing

**Statistics**

Run Rate	Trailing: Ave. Monthly Costs to Date
	Future: Expected Monthly Costs
Margins	Trailing: Ave. Gross Margins to Date
	Future: Expected Gross Margins
Size of Market	\$ or Unit Size of Addressable Market
Geo Focus	Geographic Focus, Now and Near Future

**Return Metrics**

Social IRR	Metric 1	% or #
	Metric 2	% or #

**Business Overview**

Summary of your company, highlighting the problem, solution and potential impact.

<SBP.C: Anchor Purpose>  
 <SBP.C: Beneficiary Problem>  
 <SBP.C: Customer Problem>  
 <SBP.C: Solution>  
 <SBP.C: Opportunity>

Representative Picture Placeholder

**Traction**

Progress to date.

**Addressable Problem or Opportunity**

Summarize what problem your company is addressing. This can be a specific impact problem and/or a new "greenfield" opportunity. For those business with a two-pronged constituent model (separate beneficiary and customer), provide the primary problem for each.

<SBP.C: Beneficiary Problem>  
 <SBP.C: Customer Problem>  
 <SBP.C: Opportunity>

**New Capital Use**

What are the primary ways the company will utilize new capital?

**Solution**

Summarize what value your company provides to the customer and beneficiary. Describe the product and/or service you provide.

&lt;SBP.C: Solution&gt;

**Financial Summary**

Narrative and supporting graphic of applicable financials to date and future.

Financial Graphic Placeholder

**Profit Model**

How will your company derive revenue? What are the main cost drivers?

&lt;SBP.C: Profit Model&gt;

**Customer Segmentation**

Describe your customers. What are their specific demographic and behavioral characteristics?

&lt;SBP.C: Customer Segments&gt;

**Market Strategy**

How will you promote and sell your product/service(s)?

<SBP.C: Key Partners>  
 <SBP.C: Growth Strategy>

**Competitive Advantage**

What makes your company and/or your product/service remarkably different from others trying to solve the same problem set?

&lt;SBP.C: Differentiation&gt;

**Team**

picture	<b>Name</b>	<i>Role</i>
<ul style="list-style-type: none"> <li>Background bullets</li> <li>Background bullets</li> </ul>		
picture	<b>Name</b>	<i>Role</i>
<ul style="list-style-type: none"> <li>Background bullets</li> <li>Background bullets</li> </ul>		

**Board or Advisors**

picture	<b>Name</b>	<i>Role</i>
<ul style="list-style-type: none"> <li>Background bullets</li> <li>Background bullets</li> </ul>		
picture	<b>Name</b>	<i>Role</i>
<ul style="list-style-type: none"> <li>Background bullets</li> <li>Background bullets</li> </ul>		

- List current Board members and/or Advisors, their affiliation and high-level background.

# Executive Summary:

Logo Placeholder

## Investment Snapshot

## Business Overview

<b>Company Profile</b>	
Founded	
HQ Location	
Staff Size	
Industry	
<b>Financing</b>	
New Capital Need	
Funding Round	
Capital Raised	
Pre-\$ Valuation	
<b>Statistics</b>	
Run Rate	Trailing:
	Future:
Margins	Trailing:
	Future:
Size of Market	
Geo Focus	
<b>Return Metrics</b>	
Social IRR	



Representative Picture Placeholder

## Traction

## Addressable Problem or Opportunity



## New Capital Use

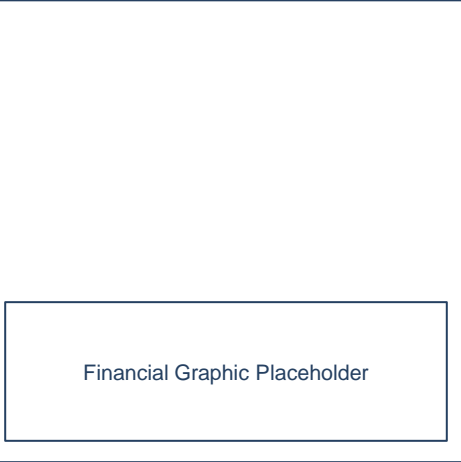
## Solution



## Financial Summary

## Profit Model

## Customer Segmentation



## Market Strategy

## Competitive Advantage



## Team

## Board or Advisors

picture		
picture		

picture		
picture		



We welcome comments and suggestions:  
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