

Before speaking to VCs, your business needs to show that it's not just surviving but that it's ready to scale.

This checklist breaks down the critical elements investors look for in a marketing-ready scale-up, with actionable insights to help you prepare.



TAM / SAM / SOM Analysis

Do you have a clear understanding of your market size and opportunity?

- **TAM (Total Addressable Market):** The entire demand for your product/service.
- **SAM (Serviceable Available Market):** The portion you can target within your current capabilities.
- **SOM (Serviceable Obtainable Market):** The realistic market share you can capture over the next 1–3 years.

✓ Action Tip: Use market research, surveys, and competitor benchmarking to define and validate your market assumptions.

How We Help: We conduct competitor benchmarking, market analysis, and strategic positioning workshops to define your market landscape.

Ideal Customer Profile (ICP) & Scalable Go-to-Market Model

Ideal Customer Profile (ICP)

Can you clearly define your best-fit customer segment?

- Industry, company size, geography
- Key decision-makers and their pain points
- Purchase triggers and buying cycle

✓ Action Tip: Use sales data and interviews to build out persona templates and ICP scorecards.

How We Help: We run ICP discovery sessions, build persona frameworks, and align messaging and positioning to these insights.

Scalable Go-to-Market (GTM) Model

Do you have a proven model for customer acquisition?

- Repeatable lead generation strategies
- CAC vs. LTV ratios across segments
- Clear funnel visibility and conversion rates

✓ Action Tip: Map each GTM channel to cost, conversion rate, and customer type. Eliminate what doesn't scale.

How We Help: We build and optimise GTM strategies across key channels, test new verticals, and provide funnel reporting dashboards.

Investor-Ready Pitch Deck

Does your deck clearly convey your business model, market, traction and growth plan?

Key slides: Vision, Problem, Solution, Market, Traction, Financials, Marketing Strategy, Team

✓ Action Tip: Add a dedicated marketing slide showing CAC, channels, GTM strategy and growth roadmap.

How We Help: We co-create pitch decks, craft the marketing narrative, and support you in articulating data-backed growth plans.

Growth Metrics That Matter & Conversion-Optimised Website

Growth Metrics That Matter

Do your KPIs tell a story of sustainable, scalable growth?

- CAC (Customer Acquisition Cost)
- LTV (Customer Lifetime Value)
- CAC Payback Period
- MRR/ARR, Churn, NRR

✓ Action Tip: Create a dashboard that highlights unit economics by channel and cohort.

How We Help: We help you set up performance tracking, benchmark your metrics, and translate numbers into a story for investors.

Conversion-Optimised Website

Is your website designed to convert visitors into leads or sales?

- Clear value proposition and CTA
- Optimised for speed, SEO and mobile
- Integrated with analytics and CRM

✓ Action Tip: A/B test key landing pages and implement heatmaps (e.g. Hotjar) to refine UX.

How We Help: We redesign landing pages, implement CRO strategies, and integrate tracking tools to ensure measurable outcomes.

CRM & Marketing Automation and Scalable Acquisition Channels

CRM & Marketing Automation

Do you have a robust system to nurture leads and manage the customer journey?

- Tools like HubSpot, Salesforce, ActiveCampaign
- Automated sequences for inbound & outbound
- Segmented lead lists & lifecycle stages

✓ Action Tip: Build workflows that trigger emails or SDR follow-ups based on intent signals.

How We Help: We set up CRM systems, create automated workflows, and ensure sales and marketing alignment.

Scalable Acquisition Channels

Are your marketing channels performing and ready to scale?

- Paid media (LinkedIn, Google, Meta)
- Organic SEO, content & partnerships
- Channel-specific CAC and ROI benchmarks

✓ Action Tip: Focus budget on channels with low CAC and high scalability. Document learnings.

How We Help: We plan and execute paid media strategies, optimise channel performance, and provide monthly ROI reports.

Attribution & ROI Reporting

Can you prove where growth is coming from?

- Multi-touch attribution
- Channel ROI dashboards
- Clear path from lead to revenue

✓ Action Tip: Integrate your CRM with attribution tools (e.g., Dreamdata, Google Analytics 4).

How We Help: We build marketing dashboards, connect attribution tools, and visualise results for board-level reporting.

Post-Investment Roadmap & Next Steps

Do you know exactly how you'll use the funding?



Define Your Roadmap

Create a 6–12 month growth roadmap with clear KPIs to guide your post-investment journey



Plan Your Investments

Map out headcount and marketing investments with specific budget breakdowns



Schedule Expansion

Establish a timeline for international expansion (if applicable) with milestone targets

✓ Action Tip: Include a marketing-specific budget and milestone breakdown in your investor deck.

How We Help: We co-develop marketing roadmaps, investment breakdowns, and hiring plans aligned to your growth strategy.



Ready to Secure Your Next Round of Funding?

Investor readiness isn't a last-minute sprint.

It's a strategic approach that begins long before you enter the pitch room.

Start building your foundation for success today.

The most successful fundraising journeys begin long before the pitch deck opens. Partner with us to ensure your business captures investor attention from the very first impression.

Book a Free VC Readiness Consultation

Receive tailored guidance on addressing critical gaps in your investor readiness

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Expert Consultation

Direct access to funding specialists

Develop Your Funding Roadmap

Create a clear path to secure your funding objectives

15+

Years Experience

Guiding businesses to successful funding

Build Your Post-Investment Marketing Engine

Maximize capital deployment efficiency and drive accelerated, sustainable growth

90%

Success Rate

For properly prepared businesses

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