

Your business goals

Finding the right investors requires that you have an idea about where you want to take your business over the next five to ten years. If this is left vague, you could find yourself at odds with your investors in the future. Which of the following goals are true for you?

- I don't want to give up any control – I want the freedom to do what I want with my business.
- I want to grow my business as fast as possible.
- I want my company to have a national and possibly international footprint.
- I want to keep my company focused on the following community/region:
_____.
- I want to eventually take my company public.
- I want to make my business attractive for sale to a larger company in the next 5-7 years.
- I would be open to considering the sale of my business, but I don't want to be pressured to sell it to the wrong buyer.
- I want my business to grow to X size and then stay pretty steady from there - I don't think growth beyond a certain point is necessarily a good thing.
- I would like to keep my business in my family for generations.
- I would like to convert my business into a coop someday so that the workers, producers, and/or customers can take over the ownership and control.
- I don't want to work more than _____ hours per week. I want to take _____ weeks of vacation.
- Other: _____.
- Other: _____.
- Other: _____.

Your values

How I want my employees to be treated: _____

How I want my suppliers to be treated: _____

My values for the effect my business will have on the environment: _____

My values for the effect my business will have on the communities where it operates:

Other values:

Your Non-Negotiables

Picture an investor walking up to you and offering a check for \$1 million. What conditions would make you refuse the check? Below are some examples of things some investors might want you to compromise on.

I want to keep control – I want the freedom to do what I want with my business.

I want to pay my employees a living wage and provide good benefits.

I want to source only from suppliers that are fair-trade certified.

I want to contribute X% of my gross revenues to Y charity.

I do not want to work more than 40 hours per week so I can spend time with my family.

I do not want to use artificial colors or flavors in my product.

Other: _____.

Other: _____.

Other: _____.