

Investor Evaluation Scorecard

Instructions

Score each potential investor from 1 (poor) to 5 (excellent) across eight dimensions. Weight the first two dimensions double – they are the most reliable predictors of whether the partnership survives the first two years.

Investor Name

open text

Scoring Table

#	Dimension	Description	Weight	Score (1–5)	Weighted
01	Hospitality understanding	Do they understand that margins are 3–9%, that the first 18 months are a maturity window, and that hospitality is not a tech startup?	x2		
02	Patience and timeline	Are they prepared for a 3–5 year return horizon, or do they expect quarterly growth metrics from month one?	x2		
03	Operational respect	Will they defer to the operator on menu, staffing, and service decisions, or will they second-guess from a spreadsheet?	x1		
04	Network value	Do they bring genuine strategic connections – suppliers, landlords, talent – or only capital?	x1		
05	Financial capacity	Can they sustain the investment through a difficult first year without demanding emergency restructuring?	x1		
06	Communication style	Do they want a monthly update, or will they call every time revenue dips for a week?	x1		
07	Exit alignment	Do they understand how hospitality exits work, or are they expecting a tech-style acquisition multiple?	x1		
08	Reference quality	What do their previous investees say about them privately, not publicly?	x1		

Scoring

Weighted Total: _ / 48

Calculation: Dimensions 1 and 2 are scored out of 5 then doubled (max 10 each). Dimensions 3–8 are scored out of 5 (max 5 each). Maximum total: 10 + 10 + 30 = 48.

Interpretation

- **Above 38:** A genuinely aligned, strategic partner capable of surviving the realities of hospitality economics.
- **25 to 38:** Proceed with caution. Address weak dimensions directly before signing.
- **Below 25:** High-risk capital source, likely to produce a partnership dispute or forced operational pivot.