

20 Qualification Points to Convert Leads to Investors



In today's competitive landscape, understanding your investors before you market to them is crucial for success. This comprehensive checklist, encompassing over **20 critical data points**, is designed to help you evaluate potential investors. Knowing your investors not only **helps in crafting a compelling pitch** but also ensures a **strong, mutually beneficial relationship** from the outset.

CapRaise CRM provides 80+ investor points for you to capture - below is just a sample of the investor profile you can build:

Investor Form Profile

01

Ideal Market:

Single Line Text

02

Asset Class:
Dropdown Select:

• Class A

• Class B

• Class C

• Class D

03

Preferred Asset Type:
Pick List

• Multifamily

• Mixed Use

• Retail

• Office

• Hospitality

• Self-storage

• Other

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Preferred Unit Size:
Pick List

• 1-5 units

• 5-20 units

• 21-50 units

• 51-100 units

• 101-250 units

• 250+ units

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Partner Type: Pick List

• JV

• Co-GP

• LP

• GP/Sponsor

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Past Investments:
Dropdown Select

• Value Add

• New Construction

• Distressed

• Affordable Housing

• Core

• Core Plus

• Student Housing

• Mixed-Use

• Senior Housing

• Short Term Rentals/Airbnbs

• Mid-term Rentals

• Registered Nurses

• Co-living spaces

• Co-working spaces

• Hospitality (Hotel/Motel)

• Luxury Apartments

• Condo/Townhomes

• Highrise Apartments

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Years of Experience:

a. None

b. 1-3 years

c. 4-6 years

d. 7-9 years

e. 10+ years

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Preferred Investor
Communication? Pick List

• Monthly

• Quarterly

• Annually



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Investment Goals

- MF
- SF
- Not certain
- Passive
- active

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Areas of strength

- Underwriting
- Capital Raising
- Asset Mgmt
- Legal/Tax
- Other
- Broker Relations
(finding deals)

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Deal Size

- Less than \$1MM
- \$1MM - \$5MM
- \$5MM - \$10MM
- \$10MM - \$20MM
- \$20MM - \$50MM
- \$50MM+

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Approximate Net Worth?

- 0-\$500k
- \$500k-\$1m
- \$1m - \$5m
- \$5m - \$10m
- \$10m +

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Portal status

- Active
- Not invited
- Registered

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Desire Investment Amount

- > 25k
- 25k-100k
- 100kk-250k
- 250k-500k
- 500k-1m
- 1m <

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Risk / Return Targets

- Aggressive
- Moderate
- Safe

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**Business Plan
(rank in order)**

- Discounted Purchase Price
- Assumable Loan
- Value Add - High Renovation Budget
- Value Add - Low Renovation Budget

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Investor Strategy

- Core
- Core Plus
- Value-add
- Opportunistic

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Age Level

- 20s
- 30s
- 40s
- 50s
- 60s
- 70s
- 80s
- 90s

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Accredited Status

- Accredited
- Non-Accredited
- Sophisticated

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Areas of Interest

- Passive Investing
- General Partnership
- Cost Segregation
- 1031 Exchange

Want to See How Qualifying Data Can Improve Your Conversion Rates?

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