

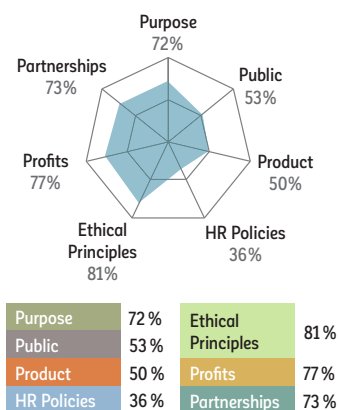
## ASSESS AND MANAGE YOUR SOCIAL BUSINESS

The Social Business Scorecard is a self-assessment tool designed to help social businesses achieve their social mission.

The result of a three-year collaborative effort, SBS lets businesses measure themselves against practices considered fundamental to a socially driven enterprise.

SBS is structured around seven dimensions, called the 7 P's. Together the 7 P's measure how the social business puts its mission into practice.

SBS indicators analyze formalized management practices. The process of filling in SBS gives valuable insight on how to increase business' social performance.



## CONTACT US TO KNOW MORE ABOUT OUR TOOLS AND SERVICES

+33 (0)1 40 36 92 92  
cerise-spm.org  
sb@cerise-spm.org



## GENERATE VALUABLE DATA TO BUILD EFFICIENT SB

- ▶ Refine your social strategy
- ▶ Define social indicators
- ▶ Drive decision making based on your mission
- ▶ Improve your services to clients
- ▶ Communicate on your social achievements to your Board, your clients, your partners

SBS also exists in a "light" version, adapted to investors' specific needs. SBS "light" is great way to communicate with funders.

## CERISE'S OFFER FOR SOCIAL ENTREPRENEURS

### Our services include

- ▶ Online and onsite trainings on SBS and social performance management
- ▶ Coaching and help desk support for self-assessments and external audits
- ▶ Post-assessment support to implement changes: refine the social strategy, define social indicators
- ▶ Benchmarking and portfolio analysis

## DOWNLOAD FOR FREE A USER-FRIENDLY TOOL

SBS, its guidelines and templates are available for free at [www.cerise-spm.org](http://www.cerise-spm.org) in French, English, Spanish and Portuguese. Social businesses can self-assess or work with an external auditor trained by CERISE.

An audit involves a desk review of strategic and operational documents, field visit and interviews and report with an action plan. Filling in SBS can take a few hours for a self-assessment by the CEO, or up to 5 days with an external auditor.

CERISE created SBS as an iterative process with a wide range of partners:





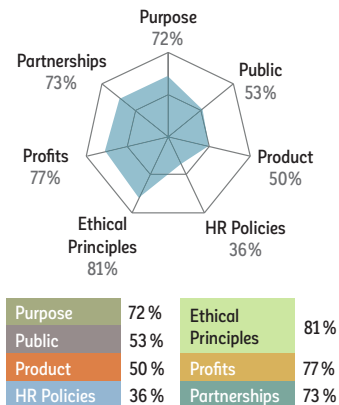
**STREAMLINE SOCIAL BUSINESS SCREENING**

SBS, the **Social Business Scorecard** is a self-assessment tool designed to help social businesses achieve their social mission.

**SBS Light is a subset of SBS**, co-created with investors for streamlined due diligence of social businesses.

Collect verifiable data with SBS Light before due diligence visits, for faster identification of strengths and risks. SBS Light lets investment officers spend less time on data collection and more time on analysis.

As they fill in SBS Light, investment officers analyze the business's management practices. It's a process that gives valuable insight into potential social risks and where technical assistance may be necessary.



**CONTACT US TO KNOW MORE ABOUT OUR TOOLS AND SERVICES**

+33 (0)1 40 36 92 92  
cerise-spm.org  
sb@cerise-spm.org

**GET VALUABLE DATA FOR INVESTMENT DECISIONS**

- ▶ Easily identify social businesses
- ▶ Better understand different SB models and profiles
- ▶ Quickly assess social and reputational risk
- ▶ Get an overview before going deeper into a social audit
- ▶ Visualize results in a dashboard that can be attached to investment memos



**CERISE'S OFFER FOR INVESTORS**

**Our services include**

- ▶ Definition of impact thesis and operationalization of social strategy.
- ▶ Fast diagnostic of policies and process in place at fund level.
- ▶ Trainings on SPM for investment teams.
- ▶ Creation of reporting systems and dashboards for top management and investment committees.
- ▶ Benchmarking and portfolio analysis.

**DOWNLOAD FOR FREE A TOOL FOR DUE DILIGENCE**

SBS Light is available for free on [www.cerise-spm.org](http://www.cerise-spm.org) in French, English, Spanish and Portuguese. Select the "light" option directly on the welcome page of the Excel file. The tool is designed to be filled in easily, first with a desk review of key strategic and operational documents, then with a short field check to probe certain points.

In exchange for using SBS Light for free, the completed SBS is to be shared with CERISE on an anonymous basis, for benchmarking and research purposes.

*CERISE created SBS as an iterative process with a wide range of partners:*

