



# Impact Investment: A Practical Guide to Investment Process and Social Impact Analysis (Wiley Finance)

By Keith A. Allman

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**Apply a rigorous investment process and integrate social impact analyses to successfully select and invest in social impact investments**

*Impact Investment: A Practical Guide to Investment Process and Social Impact Analysis* is a must-read guide for investors and wealth managers entering the social finance investment space known as "impact investing." This book walks readers through the demanding task of properly executing an impact investment strategy, providing solutions to some of the most vexing challenges that arise when investing for both financial return and social impact. Readers will learn how impact investing is different from other strategies, how the organization's mission affects investment decisions and structures, and what to look for in an organization prior to investing. A running example of a village distribution company illustrates the methods and concepts in action, and a full-fledged case study utilizing downloadable professional level analytical tools consolidates all examples into a real-world setting.

Impact investing is generating significant momentum, but many individuals operating in this space come from alternative backgrounds and lack the knowledge to form a rigorous investment process. Disparate funding sources, immature markets, variations in fund economics, and the need to generate and report social impact all complicate the industry even further, creating a barrier for curious investors. This book is a guide to applying standard investment processes and social impact analyses to impact investing, helping readers:

- Adjust standard analysis techniques to suit the particularities of impact investing
- Discover how social mission influences the entire investment from entry to exit
- Plan and execute a robust custom impact investment strategy
- Understand social impact entities and the management of impact investments

Investing with the goal of social impact doesn't remove the need for rigorous investment techniques and diligent processes. *Impact Investment: A Practical*

*Guide to Investment Process and Social Impact Analysis* is a guide to putting it all together, for a more targeted approach to impact investing.

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**Impact Investment: A Practical Guide to Investment Process and Social Impact Analysis (Wiley Finance) By Keith A. Allman Bibliography**

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### Editorial Review

#### From the Inside Flap

*Impact Investment: A Practical Guide to Investment Process and Social Impact Analysis* and its companion website are a practical guide for investors and wealth managers entering the social finance investment space known as "impact investing." Written by Keith A. Allman with the contribution of Ximena Escobar de Nogales—noted impact investing experts—this essential resource offers step-by-step guidance for navigating the demands of executing an investment strategy that will have significant social impact, while simultaneously generating profitable results.

Designed as an accessible resource, *Impact Investment* is filled with the information and tools needed to produce evidence-based investing that puts the focus on the investment process and social impact measurement. The authors outline the everyday tasks that are necessary to master in order to become a savvy impact investor. They examine the accounting, corporate finance, valuation, statistical measurement, and social metric analysis that, combined, are the essential elements for evaluating a potentially profitable social impact investment. While there are many aspects that work universally for investors, the authors highlight equity investments since they are the predominant force in impact investing. In addition, the text includes a running example of a fictitious village distribution company that illustrates the methods and concepts in action, and a full-fledged case study using downloadable professional-level analytical tools, which consolidates all the examples into a real-world setting.

*Impact investing* is a unique and demanding field that requires an unusual range of skill sets. Impact Investment gives investors an opportunity to discover how both the financial and social aspects of impact investing intertwine, creating a challenging but highly rewarding form of investment.

#### From the Back Cover

#### Praise for Impact Investment: A Practical Guide to Investment Process and Social Impact Analysis

"A detailed guide which is a 'must read' for new and seasoned investors as well as those seeking investments to support entrepreneurial, social, and environmental ventures that aim to generate financial returns. The manual describes every step of a rigorous investment journey – from investment analysis and valuation, to preparation of a term sheet, to closing the deal and post-investment monitoring and exit. In that sense, it is a primer for anyone wishing to understand what a thorough financial investment process looks like, whether an investor or an entrepreneur seeking investment. It draws on hypothetical impact investment candidates, enhanced by an accompanying website to illustrate each step of the investment components in greater detail. However, the book goes one step further by including considerations that should lie at the forefront of considerations by a growing spectrum of investors seeking positive social/environmental outcomes as a result of their investment choices. The value of this guide lies in its ability to highlight the complexities inherent in the impact investment process."

—**Pamela Hartigan**, Director, Skoll Centre for Social Entrepreneurship, Saïd Business School, University of Oxford

"The only informed and practical approach to impact investment available today."

—**Davis Broach**, Lecturer Practitioner, American University

*"Impact Investment* is a compelling guide for anyone who wants to use investment as a force for good. Keith and Ximena use a comprehensive case study to teach us how to simplify the seemingly complex process of social impact analysis in the investment process. They show us the critical role impact measurement systems can play in judging performance and making rigorous investment decisions—by measuring what matters, we can make successful investments that also make a difference in the lives of all stakeholders."

—**Andrew Kassoy**, co-founder, B Lab

"Keith Allman and Ximena Escobar de Nogales have produced the first comprehensive, practical review of impact investing. A coming of age that coincides with the slow maturing of that field of social investment and a professional review of how to navigate the treacherous waters of hybrid investment models, where historically social impact and profitability often generated more conflicts of interest than real benefits. The authors provide a well-balanced account of how to keep that ship on a virtuous course."

—**Dr. Benoit Leleux**, Stephan Schmidheiny Professor of Entrepreneurship and Finance Director of the IMD; Lombard Odier Global Family Business Award IMD (Lausanne, Switzerland)

#### About the Author

**KEITH A. ALLMAN** is a Director in Deutsche Bank's Structured Credit group, working on esoteric asset-backed securities. Previously, he was a Senior Investment Manager with Bamboo Finance, a commercial impact investment firm managing a unique portfolio of direct venture and private equity investments around the world. He currently engages in impact-related work as a Director on the board for Relief International.

**XIMENA ESCOBAR DE NOGALES** is the Head of Impact Management for Bamboo Finance, a private equity firm investing in low-income business models in developing markets. She is responsible for impact management throughout the investments' life cycles. Previously she worked at BlueOrchard, the Global Fund to fight HIV% Aids, Tuberculosis and Malaria, and a Swiss Foundation promoting dialogue and economic reconstruction in conflict-ridden countries.

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**Amelia Page:**

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**Shannon Palmer:**

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