



**DEER ISLE**  
— GROUP, LLC —

Data-Driven, Experienced  
Capital Sourcing  
**Content Calendar**  
&  
**Sample Templates**



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# Summary

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- Update: Announce Close!
- Update Post-Close: Formal

## Contact



## WHY CONTENT CALENDAR?

To build a capital markets brand, it is useful to think about having a consistent messaging process and a content calendar. A content calendar is a plan for a variety of content messages across a set amount of time that connects with and informs a target capital audience with the goal of asking for capital as well as building visibility, brand recognition and virtual relationships.

The table (below) illustrates a sample content calendar. The total number and sequence of emails will vary depending on when the various events occur and in what order, but the table should give a sense of the types and variety of content that connect with Capital Providers.

The goal of the email outreach is to build virtual relationships and an institutional brand such that the Capital Provider responds when your capital opportunity is relevant to them. This might happen on the first email - especially if your investment proposition matches their investment goals. It is more likely to happen over time as you build your virtual relationship with the Capital Provider and their investment goals align with your investment proposition.

Independent of the message type, it is important for each email to clearly articulate its objective, convey your brand and message and provide value to the Capital Provider. It is important to think about your messaging from the view of the Capital Provider.

Each Capital Provider has their own capital investment goals and constraints. The closer your email is to articulating your investment opportunity in a manner that matches those goals and constraints, the more likely the Capital Provider will be interested in responding.



# TIME IS DUE DILIGENCE

It is important to remember that “[Time is Due Diligence](#)”. Capital Provider’s will only provide capital when they trust, and trust is developed over time. A continuous push of value-add information is an integral part of creating a virtual relationship which can lead to a personal relationship which can lead to an investment.

The key is that you shouldn’t stop once your subscription has ended or raised the full transaction amount. You should continue reaching out to your institutional audience, not only to the ones who have already invested, but also to all those who are in your TACM.

This way, when you need to raise capital again in the future, you are not starting from square one again, because you have built a large network of virtual relationships and built your capital markets brand.

The idea is to continuously stay in front of your entire potential investor universe (TACM), sending out updates, webinars, research, etc., gaining mindshare even if they are not necessarily responding to your emails.



# CONTENT CALENDAR - SAMPLE SEQUENCE

Sample Sequence	Sample Email: See Appendix	Content Examples	Sample Attachments	Email Template Form
1	Introduction	Short Intro Focused on Main Selling Points	Exec Summary	Formal
2	Follow Up (Forward)	Forward of "Send 1" with Personal Note from Executive Sender	Forward: Send 1 (Incl Exec Summary)	Informal Forward
3	Update	Summary of Significant Event that builds Capital Markets credibility: New Deal Close, New Revenue Contract, New Pipeline LOI, Other Major Milestones	Exec Summary	Formal
4	Online Event: Announcement	Invitation to attend Virtual Roadshow hosted by relevant people with content summary	5 to 10 slides Less Than 20 Min/10 Min Q&A	Formal
5	Online Event: Reminder	Reminder: Forward of "Virtual Roadshow"	5 to 10 slides Less Than 20 Min/10 Min Q&A	Formal
6	Update	Summary of Significant Event that builds Capital Markets credibility: New Deal Close, New Revenue Contract, New Pipeline LOI, Other Major Milestones	Exec Summary	Informal
7	Research/ Whitepaper	Proprietary research that builds upon and highlights data that builds capital markets brand	Research Piece or Whitepaper	Formal
8	Online Event: Announcement	Invitation to attend Webinar or Podcast hosted by relevant people with content summary	5 to 10 slides Less Than 20 Min/10 Min Q&A	Formal
9	Online Event: Reminder	Reminder: Forward of "Webinar/Podcast"	5 to 10 slides Less Than 20 Min/10 Min Q&A	Formal
10	Update	Summary of Significant Event that builds Capital Markets credibility: New Deal Close, New Revenue Contract, New Pipeline LOI, Other Major Milestones	Exec Summary	Formal
11	Update: Announce Close	Announce Capital Close		Formal
<b>AFTER TRANSACTION CLOSE</b>	Update: Post-Close	<i>Continue To Send Updates, Research, Webinar/Podcasts To Continue To Build Capital Markets Brand And Virtual Relationships To Maximize Future Outcome</i>	As Needed	As Relevant

**Repeat Updates, Research, Webinars/Podcasts as Relevant and Required**

## Appendix: Sample Emails

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# INTRODUCTION (Brand/IR) : FORMAL Use Email Template Form

## “Formal”

To: [Recipient Email Address]  
From Shadow Email]  
Date: [Date Sent]  
Subject: <https://deerislegroup.com/news/capital-market-email-subject-lines-that-work-dos-and-donts/>



Dear XXX,

I am the [CEO/Founder] of XXXX and wanted to introduce our organization since we would like to begin the process of building a relationship in preparation for a potential investment opportunity.

Over time, we plan to send you newsworthy updates, research, and other communications about our organization’s progress.

Some compelling considerations about our organization include (Organization highlights):

- Quantitative Positioning
- Qualitative Forecasting
- Support for Quantitative or Qualitative
- Competitive Position

Should you want to schedule a call to learn more about us - please let us know some good days/times?

Thank you,  
(Email signature)

CEO and Founder  
Company Name  
Company Address  
Direct: Number  
Email:

Yes  
I'm Interested

Not Now  
Keep Me in the  
Loop

Not Interested

Not Applicable  
to My Firm

Company Disclaimer

Unsubscribe from this Opportunity

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# INTRODUCTION (Transaction): FORMAL Use Email Template Form "Formal"

To: [Recipient Email Address]  
From Shadow Email]  
Date: [Date Sent]  
Subject: <https://deerislegroup.com/news/capital-market-email-subject-lines-that-work-dos-and-donts/>



Dear XXX,

I am the [CEO/Founder] of XXXX and wanted to introduce you to a compelling investment opportunity designed to capitalize on XXXXX (see attached Executive Summary).

[Intro sentence or two related to (Opportunity highlights):

- Quantitative Positioning
- Qualitative Forecasting
- Support for Quantitative or Qualitative
- Competitive Position

Is there a convenient time for a call the week of XXXXX so that we might tell you more ? If not, please feel free to suggest a more convenient date/time.

Yes  
I'm Interested

Not Now  
Keep Me in the  
Loop

Not Interested

Not Applicable  
to My Firm

Thank you,  
(Email signature)

CEO and Founder  
Company Name  
Company Address  
Direct: Number  
Email:

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# FOLLOW-UP (FORWARD): INFORMAL Use Email Template Form

## “Informal Forward”

To: [Recipient Email Address]

From Shadow Email]

Date: [Date Sent]

Subject: <https://deerislegroup.com/news/capital-market-email-subject-lines-that-work-dos-and-donts/>

Dear XXX,

I am following up on an email from 2 weeks ago regarding xxxxx, and the investment thesis it presents. (see attached Executive Summary)

We believe that we present a compelling investment opportunity (Opportunity highlights):

- Quantitative Positioning
- Qualitative Forecasting
- Support for Quantitative or Qualitative
- Competitive Position

Thank you for your consideration and I look forward to scheduling a call - perhaps next week, or what time works best for you?

First Name of Executive

Title

Address

Yes  
I'm Interested

Not Now  
Keep Me in the  
Loop

Not Interested

Not Applicable  
to My Firm

Company Disclaimer

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> FORWARD FORMAL INTRO EMAIL <

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# UPDATE: FORMAL Use Email Template Form "Formal"

To: [Recipient Email Address]  
From Shadow Email]  
Date: [Date Sent]  
Subject: <https://deerislegroup.com/news/capital-market-email-subject-lines-that-work-dos-and-donts/>



Dear XXXXXX,

We are very excited to announce that we have just XXXXX [Event can be anything that you are excited about, including closed transactions/deals/contracts, new staffing, expanding into new region, etc.]

[Short 2 to 3 Sentences about Why Event is Relevant and Bullets that highlight supporting points including Brand Transfer.



Major Event Terms or Other Relevant Info			

[Short 2 to 3 Sentences supporting details that are Relevant or Bullets that highlight Brand Transfer]

A quick reminder, we are in the market now raising capital for XXXXXX (see attached Executive Summary). [Single line - elevator pitch reminder or leave out if a Brand Building/IR update].

Thank you again for your consideration and I look forward to scheduling a call - perhaps next week or what time works best for you?

**Yes**  
I'm Interested

**Not Now**  
Keep Me in the Loop

Not Interested

**Not Applicable**  
to My Firm

Thank you,  
(Email signature)

CEO and Founder  
Company Name  
Company Address  
Company Address  
Direct: Number  
Main: Number  
Email:

Company Disclaimer

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# UPDATE: INFORMAL Use Email Template Form "Informal"

To: [Recipient Email Address]  
From Shadow Email]  
Date: [Date Sent]  
Subject: <https://deerislegroup.com/news/capital-market-email-subject-lines-that-work-dos-and-donts/>

Dear XXXXXX,

We are very excited to announce that we have just XXXXX [Event can be anything that you are excited about, including closed transactions/deals/contracts, new staffing, expanding into new region, etc.]

[Short 2 to 3 Sentences about Why Event is Relevant and Bullets that highlight supporting points including Brand Transfer.

- XXXXXXX
- XXXXXXX
- XXXXXXX

[Short 2 to 3 Sentences supporting details that are Relevant or Bullets that highlight Brand Transfer]

A quick reminder, we are in the market now raising capital for XXXXXX (see attached Executive Summary). [Single line - elevator pitch reminder or leave out if Band Building/IR update].

Thank you again for your consideration and I look forward to scheduling a call - perhaps next week or what time works best for you?

Thank you,  
(Email signature)

CEO and Founder  
Company Name  
Company Address  
Company Address  
Direct: Number  
Main: Number  
Email:

Yes  
I'm Interested

Not Now  
Keep Me in the  
Loop

Not Interested

Not Applicable  
to My Firm

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# ONLINE EVENT ANNOUNCEMENT Use Email Template Form "Formal"



To: [Recipient Email Address]  
From Shadow Email  
Date: [Date Sent]  
SUBJECT: <https://deerislegroup.com/news/capital-market-email-subject-lines-that-work-dos-and-donts/>

[VIRTUAL ROADSHOW or WEBINAR/PODCAST]

TITLE



OPPORTUNITY NAME

Hosted By:



Name  
Title

Date  
Time  
Please RSVP Below

Dear xxxx,

I am pleased to invite you to a [Virtual Road Show or Webinar/Podcast] introducing our xxxxx (see attached slides), a compelling investment opportunity that is specifically designed to capitalize on xxxxx.

I am the CEO/Founder of xxxxxx and in my opinion XXXXXXXX [ REASONS THAT SPEAKER BELIEVES THIS IS AN IMPORTANT OPPORTUNITY].

[Two to three sentences on any other info on the opportunity that might be discussed].

Please let us know if you are interested in joining the virtual roadshow and we will send you instructions. Replay information will be made available to interested parties.

**Yes, I'm Interested**

**Not Now  
Keep Me in the  
Loop**

**Not Interested**

**Not Applicable  
to My Firm**

Thank you,  
(Email signature)

CEO and Founder  
Company Name  
Company Address  
Direct: Number  
Email:

**Company Disclaimer**

**Unsubscribe from this Opportunity**

**Deer Isle Disclaimer**

**Unsubscribe from Deer Isle Beacon**

# ONLINE EVENT REMINDER Use Email Template Form "Formal"



To: [Recipient Email Address]  
From Shadow Email  
Date: [Date Sent]  
SUBJECT: REMINDER: <https://deerislegroup.com/news/capital-market-email-subject-lines-that-work-dos-and-donts/>

[VIRTUAL ROADSHOW or WEBINAR/PODCAST]

TITLE



OPPORTUNITY NAME

Hosted By:



Name  
Title

Date  
Time  
Please RSVP Below

Dear xxxx,

IA quick reminder about our [Virtual Road Show or Webinar/Podcast] introducing our xxxxx (see attached slides), a compelling investment opportunity that is specifically designed to capitalize on xxxxx.

I am the CEO/Founder of xxxxxx and in my opinion XXXXXXXX [ REASONS THAT SPEAKER BELIEVES THIS IS AN IMPORTANT OPPORTUNITY].

[Two to three sentences on any other info on the opportunity that might be discussed].

Please let us know if you are interested in joining the virtual roadshow and we will send you instructions. Replay information will be made available to interested parties.

**Yes, I'm Interested**

**Not Now  
Keep Me in the  
Loop**

**Not Interested**

**Not Applicable  
to My Firm**

Thank you,  
(Email signature)

CEO and Founder  
Company Name  
Company Address  
Direct: Number  
Email:

**Company Disclaimer**

Unsubscribe from this Opportunity

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Unsubscribe from Deer Isle Beacon

# RESEARCH/WHITEPAPER Use Email Template Form "Formal"

To: [Recipient Email Address]  
From Shadow Email]  
Date: [Date Sent]  
Subject: <https://deerislegroup.com/news/capital-market-email-subject-lines-that-work-dos-and-donts/>



Dear XXX,

As part of our regular communication with investors, we publish proprietary research which provides our insight into current market conditions.

In this update we highlight [a *proprietary research topic* with DATA table/chart - needs to be proprietary and specific for it to be meaningful, e.g., something specific that cannot be found in the WSJ, Bloomberg, etc and is relevant to building capital markets brand].....

### Sample Data Table



[Sentence introducing relevant findings and bullets points that highlight specific items:

- XXXXX
- XXXXX
- XXXXX]

A quick reminder, we are in the market now raising capital for xxxxxx (attached Exec Summary). Elevator pitch to remind why investment is relevant.

Thank you again for your consideration and I look forward to scheduling a call - perhaps next week, or what time works best for you?

Yes  
I'm Interested

Not Now  
Keep Me in the  
Loop

Not Interested

Not Applicable  
to My Firm

Thank you,  
(Email signature)

CEO and Founder  
Company Name  
Company Address  
Direct: Number  
Email:

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# UPDATE: ANNOUNCE CLOSE! Use Email Template Form "Formal"



To: [Recipient Email Address]  
From Shadow Email]  
Date: [Date Sent]  
SUBJECT: <https://deerislegroup.com/news/capital-market-email-subject-lines-that-work-dos-and-donts/>



XXXXXXX

Is Pleased to Announce

Closing its

[\$[Amount]

[Security Type]

On

[Date]

Dear xxxx,

We are pleased to announce that we have successfully closed out [describe offering]. We are very excited about the next state of our company and look forward to keeping you updated with our progress.

Please let us know if you would like any additional information or if you would like to have a call to learn more about us.

**Keep Me in the Loop**

Thank you,  
(Email signature)

CEO and Founder  
Company Name  
Company Address  
Direct: Number  
Email:

Company Disclaimer

Unsubscribe from this Opportunity

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# UPDATE POST-CLOSE: FORMAL Use Email Template Form "Formal"

To: [Recipient Email Address]  
From Shadow Email]  
Date: [Date Sent]  
Subject: <https://deerislegroup.com/news/capital-market-email-subject-lines-that-work-dos-and-donts/>



Dear XXXXXX,

We are very excited to announce that we have just XXXXX [Event can be anything that you are excited about, including closed transactions/deals/contracts, new staffing, expanding into new region, etc.]

[Short 2 to 3 Sentences about Why Event is Relevant and Bullets that highlight supporting points including Brand Transfer.



Major Event Terms or Other Relevant Info			

[Short 2 to 3 Sentences supporting details that are Relevant or Bullets that highlight Brand Transfer]

We appreciate your time and interest. Should you want to learn more about our company, let us know and we would be happy to schedule a call.

**I Would Like to Learn More  
About Your Company**

Not Interested

**Not Applicable  
to My Firm**

Thank you,  
(Email signature)

CEO and Founder  
Company Name  
Company Address  
Company Address  
Direct: Number  
Main: Number  
Email:

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