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Best Practices

In today's world, one of the best ways to reach someone is through email. It is true that email inboxes are cluttered, but it is a method to make direct contact with the intended recipient without hoping they find you (push your message directly to them). To obtain best response and recognition, the text of your email should match the purpose of the email since this will be the main manner in which the capital provider will obtain and decide upon whether they would like to further engage.

First Impressions

Subject Line

Content / Capital Provider Value-Add

Ask


The goal of the email outreach is to build virtual relationships and your brand such that the capital provider feels comfortable responding. 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.

Different email types include, but not limited to: Introductory, "Survey" for Investment Proposition, Update, Research, Webinar Invite/Reminder/Follow Up, Video, Reporting, etc.

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. Sometimes,





part of the capital providers constraint is that they need to know more information so 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 following templates are examples of introductory formats. There are as many formats as investment opportunities and email type. Hopefully these help illustrate the need for:

- A compelling subject line (makes a capital provider open the email to learn more)
- Clear investment proposition
- Clear capital seeker information
- Teaser/Exec Summary attachment provides clear support for investment opportunity
- An “ask”
- CEO/President/Managing Partner as sender
- Regulatory compliance