

# Startup and Investor Services

## Email Introductions Guide

### OVERVIEW

At its core, the idea of an email introduction is to intrigue the investor enough for them to click on the pitch deck link in your email. After reading your pitch deck, the ideal result is that the investor will want to set a meeting. From the meeting, ideally, the investor will want to continue conversations that eventually lead to an investment in your company.

In this guide, we will provide sample email introductions that you can ask your contacts to use when your contacts reach out to investors on your behalf. We want to make the process of your contacts brokering introductions as smooth and easy as possible. All your contacts should need to do is copy your drafted email introduction, add their name to the email closing and hit “send.”

### HOW TO USE THIS GUIDE

Keep in mind that there is no one-size-fits-all approach with email introductions. You want to be comfortable in what you are sending and mindful of the contact brokering the introduction as well as the recipient. To reiterate, this is simply a sample set of email introductions that can be leveraged in your drafting. It is up to you to make adjustments as needed.

### DIRECTIONS

- Follow the directions in the brackets. [Brackets indicate areas that need to be filled in.]
  - The **red text** provides direct examples to reference.
- Go through each comment like a checklist and check off each item as done once completed.
- The final draft of the email intro should have **NO BRACKETS** (CTRL + F to find all of the brackets).
  - **NO HIGHLIGHTING** (CTRL + A and then change highlighting to NO FILL)
  - **NO RED TEXT** (CTRL + A and then change font color to black)
- Read over the email before you send it for spelling, grammar, to make sure that your content/data is accurate and that you have not forgotten to remove inapplicable text from the example.

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## SAMPLE 1

This example is tailored more for companies that have already begun generating revenue.

**SUBJECT LINE:** Interesting [Industry (e.g. **Fintech**, **SaaS**, **Health Tech**, etc.)] Company\_[Company Name]

Hi [Investor Name],

Hope you're doing well.

I'd like to introduce you to a new client we're working with called [Company Name]. The company has been experiencing tremendous growth over the past [provide a reasonable and recent growth period (e.g. **the past two quarters; past year, etc.**)] and is currently seeking a [insert type of funding/funding round (e.g. **Series A, bridge, etc.**). **DO NOT** discuss valuation, the instrument type, or deal terms (e.g. **SAFE, convertible set, priced round, discount**)] round of funding.

As a brief background, [Company Name] has developed [provide SIMPLE one-liner explanation of solution to problem company addresses (e.g. **"a SaaS platform that eliminates manual data entry and delivers real-time data analytics, centralized reporting, and digital evidence management for law enforcement"**)]. [Insert short one-liner problem that the company has provided a solution for (e.g. **"Today these are highly complex and disconnected ecosystems of paper-based reporting, clunky devices, and outdated server infrastructure"**)]. [Company Name]'s offering presents [insert short explanation of use case and benefits the company's product/service aims to provide (e.g. **"an immediate positive ROI for departments by increasing ticket collections by 40%, while reducing the length of traffic stops by 45% and eliminating clerical manual data entry"**)].

[BRIEFLY explain competitive edge (e.g. **"Unlike most solutions sold into government agencies, [Company Name] has dramatically reduced the sales cycle, as they can rapidly deploy a solution that offers a clear and data-driven model for increasing operational safety and increasing department revenues"**)]. [BRIEFLY describe the most compelling quality of the company's go-to-market strategy (e.g. **"[Company Name]'s ability to implement quickly and their unique go-to-market strategy that is balanced with 4-year to 5-year contracts creates a compelling investment proposition"**)]. [BRIEFLY describe market traction HIGHLIGHTS (e.g. **"They have won 10 contracts with cities and counties across Illinois, Tennessee, and South Carolina with ARR of \$586k – a 583% increase since Q1"**)] and [provide strongest growth projection for quick ROI (e.g. **"[Company Name] is on track to have \$1M ARR by the end of the year"**)].

I've included a link to the company's pitch deck for your review – [Insert link to pitch deck].

Please let me know if you are interested in scheduling a time to learn more about the opportunity and I'll get you connected with [Company Name]'s CEO, [Name of CEO].

Best,

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## SAMPLE 2

This example is tailored more for earlier stage companies that have a beta or minimum viable product (MVP) and are pre-revenue.

**SUBJECT LINE:** Interesting [Industry (e.g. **Fintech**, **SaaS**, **Health Tech**, etc.)] Company\_[Company Name]

Hi [Investor Name],

We're representing a new company, [Company Name], that has developed a unique [broad category of product (e.g. **fintech solution**, **CRM solution**, etc.)] for the [value of company's target market and the target market itself (e.g. "**\$437B legal industry**")]. We haven't seen anything like it, and we see a lot of companies in the [industry] space. They're in [insert product development phase (e.g. "**private beta**") and raising their [type of financing (e.g. "**seed round**")], and I thought you might be interested in taking a look.

[Company Name] was founded by [insert founder name(s)] who recently was a part of [insert the recent roles the founder(s) were in outside of the company that are relevant to the industry or product/service the company provides (e.g. "**the legal team at Google**")]. [Insert any accelerator, bootcamp or other experience of the like that is notable (e.g. "**She's assembled a great team and they recently finished NFX Guild's summer program**")]. [Insert SIMPLE one-liner explaining the problem that the company solves (e.g. "**They've figured out how to deal with the industry's strict trust accounting rules for lawyers so they can bring this industry's main form of payment online and away from paper and check**")]. [BRIEFLY explain the solution in a SIMPLE one-liner (e.g. "**[Company Name] is mapping the industry based on the way it operates today, as a transaction network of attorneys, clients and vendors**")]. [Insert one-liner SIMPLY explaining the revenue model (e.g. "**They take a 1.7% fee of every transaction (the lowest in the industry) and the revenue potential is massive**")].

I've included a link to their pitch deck for your review – [link to pitch deck]. Please let me know if you're interested in learning more about the opportunity and I'll get you connected with [Name of Company's CEO], the company's CEO.

Best,



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## PERKINS COIE STARTUP & INVESTOR SERVICES

Our Startup & Investor Services team has decades of experience assisting startups to optimize their fundraising potential and develop their businesses as we continually build next generation services and tools to grow amazing companies.

The caliber of our connections to capital is strong and current, and our team is constantly in the market, meeting with investors to know the latest trends and specific investment criteria. To this end, we created the [Perkins Coie Investor Network](#) so our early-stage clients can get broad access to the investment community. This proprietary network was developed to profile active investors to better understand investment preferences and identify potential client synergies.

As companies gain quality advice to grow their businesses and the investment community receives high-quality deal flow, our goal is simple: **to provide valuable advice and connections to help our early-stage companies innovate and grow.**

If you have any questions about our services, please contact one of our Startup & Investor Services Directors –

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