

What goes into ensuring my investors complete their agreement?

A Quick Guide

Managing the funnel effectively is the key to a successful raise and in that there are two things to consider - how long an investor has been in the funnel and the likelihood of conversion. The time that an investor has been in your funnel directly impacts their probability of investing - the longer someone sits in the funnel without engagement, the less likely they are to invest. A personalized follow up combined with a detailed engagement plan is key to ensuring your investors continue and finalize their investment.

Invite investors

You can invite investors to DealMaker through a link or via email which will take them to the portal landing page to begin their questionnaire.

Monitor progress

DealMaker acts as your CRM to manage and monitor the status of your raise and the progress of your investors.

Follow up with investors via email/phone

DealMaker sends out automatic reminders to investors to complete the next step in their investment process. There is often an expectation from the investor that there is a personal interaction from management or leadership, especially for larger investments.

Successful companies will use custom reminders in addition to actual email or phone communications to ensure a more homogenous feeling for investors as they become a part of the company. Most investors take 3 contact points before converting, especially if they are unfamiliar with your company.

Use Tags and Notes to record interactions and direct efforts

Tagging investors allows for you to customize and group various investors and provides for an easy way to gather and analyze data on your portal activity. Utilizing the notes functions allows you to expand upon investor activity and keep your team members up-to-date on each investors progress.

Help investors complete their questionnaire

You can walk your investor through their questions by utilizing the 'investor goggles' function, seeing what they see will assist in ensuring they can continue to maneuver through their subscription.

Monitor open rates on reminders

DealMaker provides companies an audit trail for each of their investors, allowing users to keep on top of investor activity and interaction.

Our experience to date

Total Financings closed on
DealMaker:
750+

Total Capital raised on
DealMaker:
\$850m+

Internationally Compliant,
Regulation A+, D (AI), S,
OM, Brokered &
Non-Brokered Private
Placements
Fund Formation

97% decrease in
Subscription Agreement
deficiencies