



EFFECTIVE EMAILS

TARGETED OUTREACH EXAMPLES

Cold Outreach

Subject: John – quick note from Frank Winchester

John,

This is Frank Winchester, I am co-founder at Pacific Crest Group, a back-office outsource consulting firm here in the Bay Area. I'm pretty sure you have no idea who I am. Real quick why I'm writing:

Below is a link to an article and webinar on the sticky situation of how to best handle a toxic employee and how to fire them if it comes to that. This is one of the difficult topics our clients face and rely on us to help manage.

I have no idea if this or other services we provide are relevant but thought I would reach out to see if you might be open to a brief, 5-minute phone conversation. No pressure or expectations at all. At the end of the call we should have a good idea if any of our services are a fit.

We work best with Bay Area business leaders running \$2-20M organizations who are tired of dealing with issues related to back office duties such as Accounting and HR and want to free up their brain space for the fun stuff. Our goal is to turn the back office processes from a headache into a strategic advantage for growing companies.

Let me know if you're open to schedule a real quick call in the next week. Either way is perfectly fine. No matter what, I wish you the best.

Frank



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Warmer Outreach

Subject: Alan – note from Mike Sharon (re: Capital Roundtable)

Alan,

My name is Mike Sharon and I was at the Capital Roundtable meeting on September 25th. During the panel discussion you mentioned taking as many meetings as possible with service prospective service providers. I'd like to take you up on that offer.

Quick snapshot of who the heck I am - I'm SVP Client Services & Operations at Integrated Insurance Services. We partner with private equity firms to help their portfolio companies with their employee health and welfare benefits needs. Best relationships for us are operating partners with 5-25 portfolio companies that have more on their plate than what they can handle and are looking for improvement in margins & operational efficiency and open to new benefits providers / partners. Our ideal clients see us as an extension of their HR teams and appreciate that we free them up to work on things that are most pressing to the organization's growth.

I realize you don't know me from Adam but thought I'd reach out to see if you'd be open to a brief conversation (via phone or in person). I think there might be some ways our unique analytics-driven offering and experience in your space could be a valuable resource.

I'm based in California and will be working with clients in the New York area October 14 – 16 if you're open to a face:face meeting. Or if you're more comfortable we can always schedule a brief (10-minute) call first and decide from there if it makes sense to meet. No pressure or expectations. Let me know either way what you're open to.

Regards,
Mike



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Subject: Joni – note from Holly Kilborn (re: Background Studios)

Hi Joni,

I'm with Background Studios. I'm pretty sure you have no idea who I am, but here's a quick snapshot of what we do:

We use movie-style storytelling to help consumer insights and strategy projects get more traction, so colleagues and stakeholders aren't just informed, but feel inspired to take action.

You can watch our short capabilities video by clicking [here](#) or see non-confidential samples of our work by clicking on any of the photos below.

I have no idea if this is of interest to you, but thought I'd reach out to see if you might be open to a 10-minute exploratory call. At the end we'll know if there is any reason to talk further. No pressure or expectations.

If you're open, I'd be happy to set something up for you and Tim to chat. If you're not, that's fine, just let me know and I won't bug you further.

Holly Kilborn
Client Relations Manager



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Subject: John – note from Mike Fable (re: Wilson Solomon)

Hi John,

Mike Fable here with Wilson Solomon. I realize we don't know each other so I'll quickly get to the point as to why I'm reaching out.

We are the leading IPO Broker in CA and work with a lot of growing life science companies in the Bay Area. I don't know for sure what you care about and if we might be a good fit but we pride ourselves on being thoughtful, comprehensive and cost-effective partners when it comes to protecting Directors and Officers from litigation. Although we do not lead our pitch with pricing, it is a fact that our approach is often able to save you TENS or HUNDREDS of THOUSANDS of dollars on your annual insurance program.

I don't like wasting the time of busy people like yourself so if this sounds worthy of a conversation what I suggest is that we schedule a brief, no-expectations, 10-minute call to find out if we might have reason to talk further. Either way, then neither of us has wasted much time. I promise not to be a stalker.

If for any reason you're not open to talk, that's perfectly fine. All that I ask is that you let me know either way.

Best Regards,
Mike



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Subject: Louis – quick note from Brian Williams (re: D&O)

Louis,

Congratulations on your IPO. I imagine this is an exciting and hectic time. My name is Brian Williams and I'm a senior vice president and partner at Wilson Solomon. I realize you don't know me from Adam. Quick snapshot of who we are:

We are headquartered in San Francisco and Irvine, CA and have served as the exclusive D&O insurance broker on nearly 20% of the nationwide IPO's since 2010.

More than half of our 300+ Public D&O clients are in the Technology or Life Sciences. We've done a significant number of life sciences IPO's and have several currently in registration.

Based on my experience in these situations I thought there may be a chance that you are still evaluating brokers. If so, I'm reaching out to see if you'd be open to a brief, no expectations, phone conversation. I can give you a quick sense of our approach to the D&O IPO insurance process and we can both decide if there's any reason to talk further.

If you are still in the evaluation process and are open to schedule a brief, five-minute call in the next week let me know. If you are not open to talk at this time that's perfectly fine just let me know either way.

No matter what, congratulations on this exciting time and I wish you the best.

Regards,
Brian