

COMPANION RESOURCE

# Investor Outreach *Templates*

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Eight ready-to-use templates for building investor relationships, making the ask, following up with confidence, and keeping momentum moving.

From **Fundraising for The Rest of Us** by Allison Byers



TEMPLATES

# Before You Use These

These templates are starting points, not scripts. The most effective outreach is personal and shows you've done your homework: you know exactly who you're writing to and why. A thoughtful, specific message that shows your personality will always outperform a copy-paste email.

Two things to do before you send anything:

1

## **Define your Ideal Investor Profile.**

Know who you're targeting, why they're a fit, and what they care about. That context should show up in every message. Use the Ideal Investor Profile Worksheet (available in the resource library) to get clear before you start.

2

## **Start with your lower-priority investors.**

Use early outreach to sharpen your pitch and test your messaging before going to the investors you want most. Founders who close successfully reach out to an average of 56 investors. Pipeline management is a skill — build it early.

1

## Cold Outreach to an Angel

*Relationship first. No ask. No deck. No mention of investing.*

### WHEN TO USE

You've identified someone who looks like a strong potential angel investor and want to open a door without leading with the ask.

● ● ● New Message

**SUBJECT:** [Specific thing you connected with], quick question

Hi [Name],

*[Personalized hook — reference something specific: a post they wrote, a company they built, a talk they gave, a perspective they've shared publicly.]*

I'm building *[one sentence: what you do and who you serve]*. I'd love to get your perspective on *[specific question relevant to their expertise or experience]*.

Would you be open to a 20-minute conversation? I'm not pitching you for money. I'm genuinely looking for insight from someone who's been in the weeds on this.

Thank you!

*[Your name]*

*[Signature block with contact information]*

### THE WHY

Investors, especially angels, are motivated by relationships and meaning, not only financial returns. Leading with genuine curiosity and a specific hook shows you've actually paid attention to who they are. The goal of this email is one thing: a conversation.

## 2

## Warm Introduction Request

*Make it easy to say yes — and easy to forward.*

### WHEN TO USE

You have a mutual connection to an investor you want to meet. Always prioritize warm introductions over cold outreach when you can.

● ● ● New Message

**SUBJECT: Intro to [Investor name]**

Hi *[Introducer's name]*,

Hope you're doing well! I'm in the middle of a fundraising campaign for *[company]* and would love an introduction to *[Investor name]*.

I think *[Investor first name]* would be a great person to connect with because *[brief 1-2 sentence reason for the intro, including why you want to talk to them and why it might be of interest to them too]*.

Here's a quick bit about me to make it easy to forward:

*[1-2 sentence overview of you and what you do — include company name, title, and what your company/product does in plain English. Optional: Add any relevant traction, notable backers, or reason this moment is important — e.g., "We just launched," "We're currently fundraising," etc.]*

Happy to send more info if it's helpful (deck, one-pager, etc.), and no pressure at all if the timing isn't right on their end!

Thanks again,

*[Your name]*

### THE WHY

You're doing the work for your connector so they don't have to think about what to say. A clean, pre-written blurb dramatically increases the chance they actually send it.

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## The Investing Ask

*Don't bury it. Don't over-apologize for it.*

### WHEN TO USE

After several real conversations with someone you've identified as a potential angel. The relationship already exists — this is just naming what's next.

### ||

*I have to ask – would you ever consider angel investing in what we're building? I think you could bring real value beyond the capital, and I'd genuinely love to work with you. No pressure either way, but I'd be remiss not to ask."*

### THE WHY

It's direct, it's honest, and it gives them room to say no without it being awkward. You're not cornering them, you're opening a door.

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## When They Say No to Investing

*A no to investing is not a no to the relationship.*

### WHEN TO USE

An investor declines, but the relationship is warm and worth keeping.



*I completely understand — and I really value our relationship either way. I'd love to keep our conversations going just as they've been. If you ever come across someone who might be a good fit for what we're building, I'd be grateful for the introduction."*

### THE WHY

A gracious response to a no is memorable. The person who passes today may invest in your next company, refer you to someone who does invest, or become a customer, advisor, or advocate. Keep the door open.

5

## Same-Day Post-Meeting Follow-Up

Send this the same day. Without exception.

### WHEN TO USE

After every investor meeting. It signals professionalism, reduces cognitive load on their end, and keeps you in control of the timeline.

● ● ● New Message

**SUBJECT:** Follow-up from today — [Company name]

Hi [Name],

I really enjoyed our chat today! *[Optional: anything specific you want to highlight from the conversation.]*

As discussed, I'm sending over *[deck / data room link / intro to customer / whatever you committed to]* — you can find it *[linked here / attached]*.

*[Note: if there are multiple follow-ups, include them as a brief bullet list.]*

I'll follow up next week if we don't chat sooner. In the meantime, please don't hesitate to reach out with questions.

Looking forward to continuing the conversation!

*[Your name]*

### THE WHY

It accomplishes three things at once: it confirms you're organized and dependable, it delivers what you promised, and it sets an expectation for a follow-up so your next message doesn't come out of nowhere.

6

## Weekly Follow-Up

*One unanswered email is not a no.*

### WHEN TO USE

After your initial outreach or post-meeting follow-up goes unanswered. Keep going — politely, personally — until you get a clear response.

● ● ● Reply

**SUBJECT: Re: [Original thread subject]**

Hi *[Name]*,

Just following up on my note from *[day]* — wanted to make sure it didn't get buried.

*[Optional: one sentence of new context — a milestone hit, a relevant article, a question you'd love their input on.]*

Happy to work around your schedule. Let me know what works.

Thanks!

*[Your name]*

### THE WHY

Persistence is not the same as being pushy; it's professionalism. Founders who raise funds follow up consistently. Investors likely won't be offended by a polite weekly nudge; they usually respect the discipline. Just be sure to humanize your message with the tone that you understand being busy and having an ever-growing inbox, so you have a practice of sending regular pings.

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## Momentum Update

*Not a pitch. A relationship touch that shows you're moving.*

### WHEN TO USE

When you hit a meaningful milestone — new customer, revenue threshold, product launch, partnership, press hit, or key hire. Send to warm investors whether they've committed yet or not.

● ● ● New Message

**SUBJECT: Quick update: [Company name]**

Hi *[Name]*,

Wanted to share a quick update: *[specific win — be concrete and brief]*.

*[One sentence on why it matters or what it unlocks for the business.]*

Still building toward *[your next milestone / close date / goal]*. Grateful to have you in the conversation!

*[Your name]*

### THE WHY

Momentum is its own signal. Investors want to back companies that are moving. A well-timed update shows you're executing, builds confidence, and keeps you top of mind without a formal ask.

## 8

## Asking for Clarity When the Process Has Stalled

*Ambiguity is expensive. Ask directly.*

### WHEN TO USE

When an investor has gone quiet after what felt like real interest, and multiple follow-ups have gone unanswered or produced vague non-answers.

● ● ● Reply

**SUBJECT: Re: [Original thread subject]**

Hi *[Name]*,

I want to be respectful of your time and your process. It's been *[X weeks]* since we last connected, and I want to make sure I'm reading the situation correctly.

Given where things stand, would you say we're still in diligence, or should I assume this isn't the right fit right now?

Either answer is completely fine. I just want to make sure I'm managing the process clearly on my end.

Thanks!

*[Your name]*

### THE WHY

This email is hard to ignore. It's direct without being aggressive, and it gives the investor an easy out, which often produces a real response either way. A clear no is valuable because it lets you stop waiting and keep moving.