

How To: Identify Accredited Investors Online A Guide for Private Equity Firms

HOW TO BEGIN

As simple (and “Markety”) as this may sound you must prepare to best get in front of investors by having a clear understanding of your business and your goals.

Listing these out will give you what you need to create a winning approach to identifying investors online and saying what’s necessary to get them to connect and invest with you.

The Business

Who are you, what do you specifically solve for investors, how do you solve it and what makes you different?

Answering these questions and communicating this to prospective investors will set you apart from the majority of your competitors. As well as have investors coming to you rather than you reaching out to them.

Answer This

Who are you? Your Firms Name

What do you solve for investors? Problems investors face and/or outcomes they are looking to achieve.

How do you solve it? List your offering.

What makes you different? Experience, People, Proprietary, etc.

Here's How We Answer It

Who are you: Acumen Studio

What do you solve for customers: Finding new investors for PE firms, getting a positive ROI from digital marketing, measuring results accurately

How do you solve it: High ROI Content Marketing, SEO, PPC, Social, Email / Automation, Analytics

What makes you different: Years of Private Equity Experience, We Simplify the Process, and Educate our Customers on the work being done for them

Here's How We Say It

At Acumen Studio we connect firms with investors.

Our mission is to simplify the process of achieving high ROI when finding new investors online and measuring the results to identify insights that will continue to produce a high ROI across content marketing, SEO, PPC, Social Media and Email.

We are set apart by our deep private equity experience, channel experience and our mission to simplify the process of creating a high ROI digital presence while educating our customers throughout the process.

Your Goals

To Achieve Success you must know what you are actually trying to achieve.
This will be your guide when choosing how to identify investors most effectively.

Goal(s): List your goal or goals here

Common Goal Examples:

More Investors Leads

New Investors

“To be the Leading Private Equity Firm in Your Segment”

“To be known as the most consistent, high returning firm in the U.S.”

Identifying Investors

This is the part you really came for!

Knowing your target investor allows you to easily communicate in a way that moves them to engage and invest with you.

It also makes paid targeting easy and cost efficient.



So how do you find them!

Start by listing the demographics of your existing investors or if you know the demo data for the investors you want, enter that as well.

Your Investor: List your target investors characteristics here

Geography (state, city)

Things they like

Things they value

Demographics (age, sex, marital status, presence of children, etc.)

Your Customer Example: Acumen Studio Persona Example

Located in the United States

Private Equity Firms, PE Advisory Firms

Job Titles: Managing Director, General Partner, CMO, Marketing Executives, Marketing Directors, Marketing Managers

Age: 27 - 62

Sex: Male and Female

Firm Size: \$5MM to \$150MM in managed assets

Social Presence: Visible but no middle to bottom of the funnel digital strategy

Targeting Leads

One of the biggest advantages firms have today is the ability to accurately target their ideal investor across all platforms. This allows firms to message to their market quickly, efficiently and cost effectively.

It's as simple as being able to clearly articulate who that ideal investor is.

1. List the criteria for your ideal investor to form a targetable profile.
 - a. Country
 - b. State(s)
 - c. City(ies)
 - d. Companies
 - e. Company Revenue
 - f. Job Titles
 - g. Age
 - h. Sex
 - i. Interests
 - j. Income

2. Curate internal email lists
 - a. Current Investors
 - b. Leads
3. Set retargeting pixels on your website to build a cookie / pixelated list (show ads to investors who visit your website)
4. Upload email lists to Facebook, Google and LinkedIn to build lists
 - a. Target your investors and leads lists directly through ads
 - b. Target a “Lookalike” audience that matches the criteria of your target investor and leads lists

By creating these four investor / audience groups you will be armed to target investors online.

Remarks we hear often are:

My marketing team / agency has tried this before and it just didn't work.

But when we ask about the targeting details of the past we typically find that the marketers were targeting very broad demographics or interests.

It's a smarter strategy to start highly focused first and expand from there when you find messaging that resonates best with the targets so that your marketing expansion is efficient and effective.

Are You Accurately Targeting Investors Online?

If not and want to start being effective at growing leads & investors online,
Then contact us to learn more!



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