

SMARTMONEY

STARTUPS

Fundraising Sprint Program



Luis Berga



Associate – SmartMoney Startups

Founder Music Meets Video
Startup Runner VC

Sr Associate – Austin Tech Incubator
TechStars Associate

Investment Banking/Valuation

Lean Startup Expert

MBA University of Texas - Austin



Jeff (J.D.) Davids



8 Startups

3 IPOs

3 M&A Acquisitions

2 Learning Opportunities
Mentored 100's of Startups

Jeff (J.D.) Davids



Over \$1B of completed deals

Websense - IPO

Organic Online - IPO

Accrue Software – IPO

Wireless Facilities – IPO & M&A

DH Technology – IPO & M&A

Adjacency – sold for 10X Revenues

vMix Media – raised \$21M

SG Biofuels – raised \$26M

Royal Dutch Shell – 3 Divestitures

Prior:

KPMG Peat Marwick

Ohio State University

United States Marine Corps



Sprint Program Rules of Engagement

- Safe place to share
- No dumb questions
- Confidentiality
- Full transparency
- Rigorously honest
- Ask questions, suggest solutions/ideas
- Don't take it personally
- Don't mean it personally

Fundraising Sprint Program

MODULE 1: MARKET MAPPING

Start the Research and Meet Your Fellow Members

- ✓ Learn how to navigate multiple database tools to get an in-depth look at your industry, competitors and relevant VC & M&A deals.
- ✓ Understand how to filter and prioritize the key findings from the database research and why it's important for your business.
- ✓ Meet the community and learn how the diverse skills can build each other up.

Fundraising Sprint Program

Meet the Team

Fundraising Sprint Feb 2017



Nader Fathi



Savina Hawkins



Joel Russell



Remy Mraz



Vivienne Francis



Ian DeVries



Alex Cano

Fundraising Sprint Components

- Market Map of Key Industry Players
- Target List of SmartMoney Investors
- Fundraising Campaign Roadmap
- Investor Email Templates
- Customer Traction Report

Program Schedule

COURSE OVERVIEW:

Feb. 2, 2017 at 9:00am PST – Module 1: Introduction & Market Mapping

Feb. 9, 2017 at 9:00am PST – Module 2: Targeting Deals & Investors

Feb. 16, 2017 at 9:00am PST – Module 3: Fundraising Campaign Roadmap

Feb. 23, 2017 at 9:00am PST – Module 4: Email Templates & Investor Readiness Scorecards

ASK ME ANYTHING SESSIONS:

Feb. 7, 2017 at 9:00am PST – AMA Session (Ask Me Anything)

Feb. 14, 2017 at 9:00am PST – AMA Session (Ask Me Anything)

Feb. 21, 2017 at 9:00am PST – AMA Session (Ask Me Anything)

Feb. 28, 2017 at 9:00am PST – AMA Session (Ask Me Anything)

Fundraising

FUNDRAISING: 2 Approaches

- Shotgun approach
- Targeted Approach

A METHODOICAL PROCESS

Step by Step

Instructions

With Billion Dollar Results

Why is the
PROCESS
so important?

How Much

Is your

TIME

Worth?

Your Most Valuable Asset

- 3-12 month process
- 60% of CEO time minimum
- Capital Efficiency
- Time efficiency

A METHODOICAL PROCESS

Sales & Marketing 101

Build a Target List

Work the List

Target SmartMoney Investors



Who are the WRONG Investors?

No VERTICAL MARKET
EXPERTISE

No Exits in your Vertical
No Investments in your vertical

Not Actively writing checks

Who are the RIGHT Investors?

VERTICAL MARKET EXPERTISE
(company names & roles)

Successful Exits - verify

Prior Investments - verify

Vertical Market Ops Experience

RECENT CHECKS WRITTEN

SmartMoney Investors Bring:

- Deep Industry Relationships
- Vertical Industry Knowledge
- Experience Building Sales Velocity
- Channel Partners
- Strong Co-Investor Networks
- Introductions to Acquirers
- Industry Analyst Introductions

Finding SmartMoney

Build a Target List

Market Map

Relevant Deals

Relevant Investors

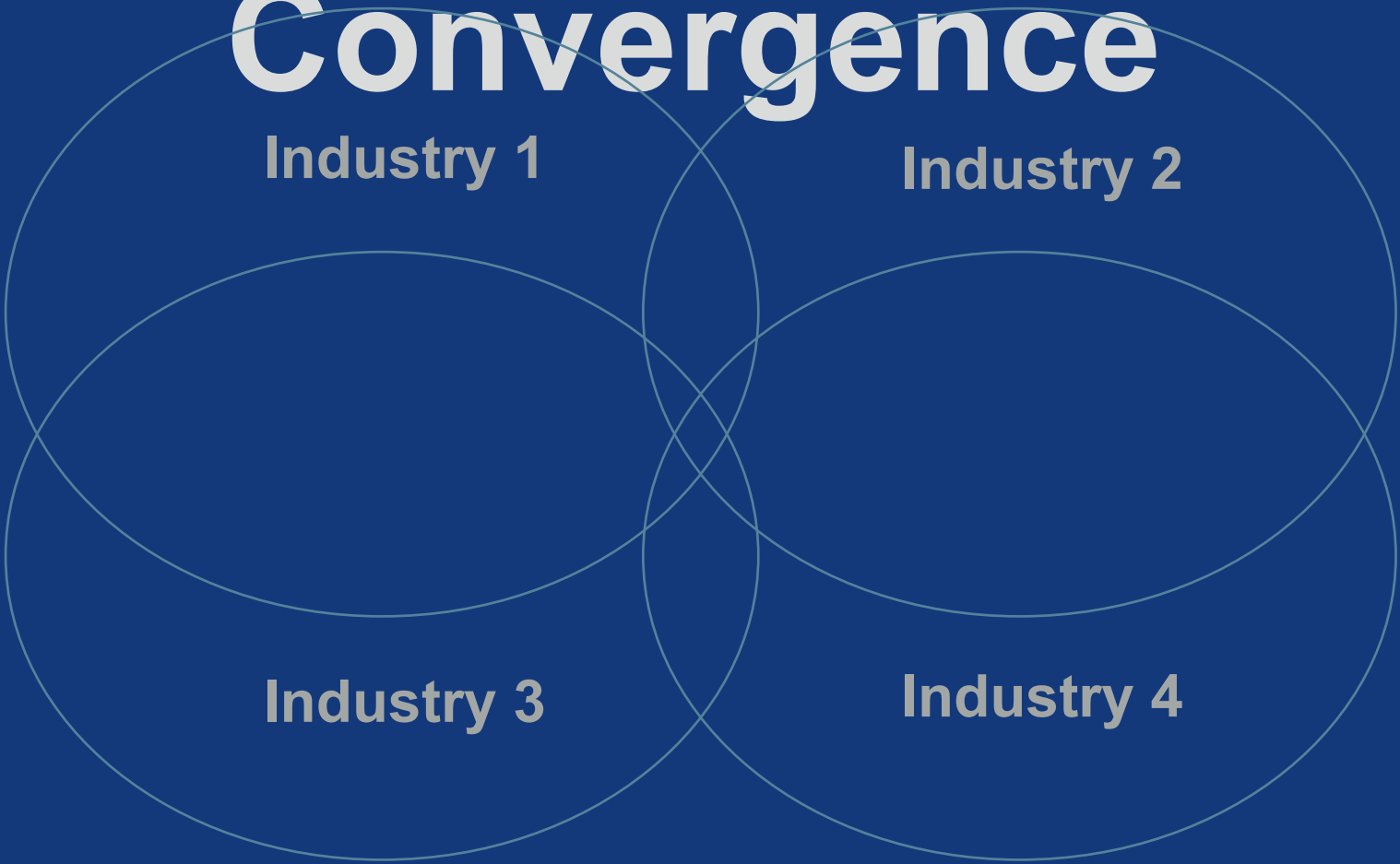
Industry Convergence

Industry 1

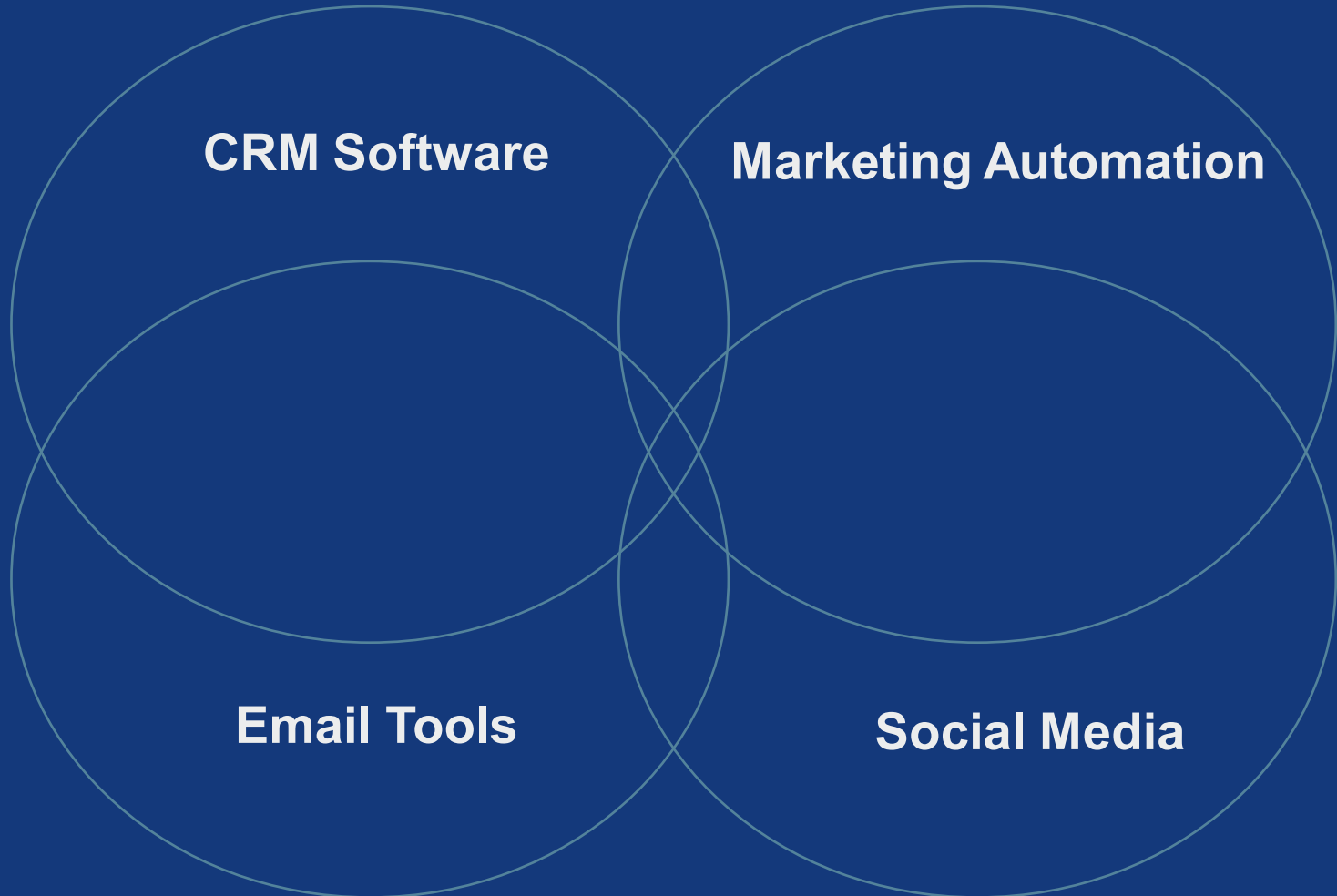
Industry 2

Industry 3

Industry 4



Industry Convergence Example: Marketing Automation



Example Market Map

Marketing Automation Vertical

Industry 1

CRM

Oracle CRM On Demand
SAP
Siebel / Oracle
Salesforce
Microsoft Dynamics
Sage
SugarCRM
Nimble
InfusionSoft
HubSpot
Pardot
HubSpot

Industry 2

Marketing Automation

Eloqua
InfusionSoft
HubSpot
Teradata / Aprimo
Unica/IBM
Marketo
SimplyCast
Silverpop
Pardot
Action
Signal
NeoLane

Industry 3

EMAIL

Gmail/Google
Outlook
Yahoo
Zoho
Inbox.Com
FastMail
Constant Contact
BlueHornet
GMX
AOL
Lycos
HushMail

Industry 4

Social Media

Facebook
YouTube/Google
Twitter
LinkedIn
Pinterest
Instagram
WhatsApp
SnapChat
Tumblr
Reddit
Vine
Meetup

Successful Dealpath: IPO and then \$879M Exit

Company Name (Investee)	Financing Round	Financing Amount	Financing Date	Investor Company	Investor First Name	Investor Last Name
Eloqua	Acquired	\$879M	12/20/12	Oracle	Thomas	Kurian
Eloqua	IPO	\$92M	8/2/12	IPO	N/A	N/A
Eloqua	Series C	\$23M	10/15/07	Bessemer Venture Partners	Byron	Deeter
Eloqua	Series C	\$23M	10/15/07	JMI Equity	Brad	Woloson
Eloqua	Series C	\$23M	10/15/07	Bay Partners	Neal	Dempsey
Eloqua	Series B	\$12.8M	9/6/06	Bay Partners	Neal	Dempsey
Eloqua	Series B	\$12.8M	9/6/06	JMI Equity	Brad	Woloson
Eloqua	Series A	\$5M	5/9/05	JMI Equity	Brad	Woloson
Eloqua	Seed	UND	UND	Individual Angel	Harry	Weller
Eloqua	Seed	UND	UND	Individual Angel	Neil	Sadaranganey
Eloqua	Seed	UND	UND	Individual Angel	Aaron	Rothschild
Eloqua	Seed	UND	UND	Individual Angel	Ron	Thompson
Eloqua	Seed	UND	UND	Individual Angel	Keith	Burrows
Eloqua	Seed	UND	UND	Individual Angel	Dennis	Dayman
Eloqua	Seed	UND	UND	Individual Angel	Jeffrey	Kadanoff

Successful Dealpath: eCommerce \$75M Exit

SmartMoney Target Investor Research List					
<u>Company Name</u>	<u>Financing Round</u>	<u>Financing Amount</u>	<u>Financing Date</u>	<u>Investor Firm</u>	<u>Investor Name</u>
Milo	Acq by eBay	\$75M Acq by eBay	12/2/10		
Milo	<u>Series A</u>	4M	11/24/09	True Ventures	Jon
Milo	<u>Series A</u>	4M	11/24/09	Soft Tech VC	UNI
Milo	<u>Series A</u>	4M	11/24/09	Individual Angel	Chr
Milo	<u>Series A</u>	4M	11/24/09	Individual Angel	Kev
Milo	<u>Series A</u>	4M	11/24/09	SV Angel	Bria
Milo	<u>Series A</u>	4M	11/24/09	Individual Angel	Ayd
Milo	<u>Series A</u>	4M	11/24/09	Individual Angel	Aar
Milo	<u>Series A</u>	4M	11/24/09	Individual Angel	Keit
Milo	<u>Series A</u>	4M	11/24/09	Individual Angel	Mag
Milo	<u>Seed</u>	.95M	11/1/08	Khosla Ventures	Keit
Milo	<u>Seed</u>	.95M	11/1/08	Eventbrite	Kev
Milo	<u>Seed</u>	.95M	11/1/08	comScore	Mag
Milo		N/A - Exec	N/A - Exec	Fmr CEO - Milo	Jack

Table with columns: Name, Address, City, State, Zip, Phone, Email, Website, and other contact details for various individuals and companies.

Understand your environment

Do your homework: Invest in the Research

Scrub ~ 200 Names

Note relevant strategic connections to YOUR deal

Gain Deep Industry Knowledge

Table with columns: Name, Address, City, State, Zip, Phone, Email, Website, and other contact details for various individuals and companies.

Example Shortlist: eCommerce

Relevant, Active Investors

Relevant Deal Notes

SmartMoney Target Investor Research List

Company Name and	Financing Round	Financing Amount	Investor Company	Investor Name	Priority	AngelList Profile	LinkedIn Profile
Milo	Series A	4M	Individual Angel	Aa	A - Founder, CEO Milo	https://angel.co	https://www.linkedin.com/in/ap
Milo		N/A - Exec	Fmr CEO - Milo	Jack	A - fmr CEO Milo - 6 angel deals	https://angel.co	https://www.linkedin.com/in/jac
Kayak	Series A	\$8.5M	Kayak - fmr CoFounder	Paul En	A - fmr Kayak Co-Founder	https://angel.co	https://www.linkedin.com/in/
Kayak	Series A	\$8.5M	Kayak - fmr CoFounder	Bill O'Donnell	A+	https://angel.co	https://www.linkedin.com/in/
Kayak	Series A	\$8.5M	Fmr General Catalyst	Nite	A+	https://angel.co	https://www.linkedin.com/in/
Kayak	Series A	\$8.5M	Individual Angel	Somesht	A+	https://angel.co	https://www.linkedin.com/in/
ShopSavvy	Seed		Individual Angel	Alexander	A - fmr CEO, ShopSavvy	N/A	https://www.linkedin.com/in/an
ShopSavvy	Seed	.700M	Architel LP	Scott	Discuss - CoFounder ShopSavvy	https://angel.co	https://www.linkedin.com/in/sc
ShopSavvy	Seed	.700M	Individual Angel	Scott	Discuss - CoFounder ShopSavvy	https://angel.co	https://www.linkedin.com/in/sc
Square	Series A	\$10M	Individual Angel	Robin	A Competitor - CEO Operator?	https://angel.co	https://www.linkedin.com/in/ro
ShopSavvy	Seed	.700M	Canyon Creek Capital	Buck Jordan	A (Bridge to the A Round)	https://angel.co	https://www.linkedin.com/in/bu
BlueCava	Seed	\$1.5M	Individual Angel	Mark Cuban	A - Active	https://angel.co	v.linkedin.com/in/mark-cubar
BlueCava	Series A	\$5M	Mark Cuban Companies	Omar	A - Active	https://angel.co	https://www.linkedin.com/in/omarage
Square	Series A	\$10M	Individual Angel	Josh	A - Active Angel	https://angel.co	https://www.linkedin.com/in/jos
Wish	Seed		Caffeinated Capital	Rayn	A - Active angel	https://angel.co	https://www.linkedin.com/in/
Purch	Series B	\$33M	Highway 12 Ventures	Mark	A - just recently left Purch Board	https://angel.co	https://www.linkedin.com/in/m
Purch	Series A2	\$1.5M	Highway 12 Ventures	Mark	A - just recently left Purch Board	https://angel.co	https://www.linkedin.com/in/m
Purch	Series A	\$6M	Highway 12 Ventures	Mark	A - just recently left Purch Board	https://angel.co	https://www.linkedin.com/in/m
CEO of eBates - huge exit with little capital investment				Kevin Johnson	A - possibly	N/A	https://www.linkedin.com/in/kevinhio
Jet	Seed	\$4.9M	Individual Angel	David	A - Young, Active Angel	https://angel.co	https://www.linkedin.com/in/

LinkedIn Profile Connections

Active eCommerce Investors:

Do these people know that your company exists?

Making your list

Making your list

HANDOUTS

MARKET MAP

INDUSTRY 1

INDUSTRY 2

INDUSTRY 3

INDUSTRY 4

GORILLAS

1

2

3

4

5

6

7

Making your list

STEP 1

LIST

VERTICAL INDUSTRY

SECTORS

Making your list

STEP 2

LIST COMPANIES

KEY INDUSTRY PLAYERS

Making your list

5,000 lb Gorillas

Successful Exits

Rising Stars

Competitors

Adjacent Players

MARKET MAP

INDUSTRY 1

INDUSTRY 2

INDUSTRY 3

INDUSTRY 4

GORILLAS

1

2

3

4

5

6

7

MARKET MAP

INDUSTRY 1

INDUSTRY 2

INDUSTRY 3

INDUSTRY 4

COMPETITORS

1

2

3

4

5

6

7

MARKET MAP

INDUSTRY 1

INDUSTRY 2

INDUSTRY 3

INDUSTRY 4

OTHERS

1

2

3

4

5

6

7

Making your list

STEP 3

FIND RELEVANT DEALS

Tools to use

Crunchbase

VentureDeal.com


Angellist

CB Insights


Crunchbase


Cost:
Free

CrunchBase | The Business Graph


Search for organizations, people, events, and products 


[Advanced Search](#)


CrunchBase
Investor Leaderboard 

CrunchBaseDaily
The source for all things Startup 

CrunchBase Daily - Top Funding Rounds [SUBSCRIBE](#)

 **Slack**
Slack, previously known as Tiny Speck, is a...
\$160M / Series E
Investors: [Kleiner Perkins Caufield & Byers](#)
[Accel Partners](#)
[Index Ventures](#)
[Andreessen Horowitz](#)
[Google Ventures](#)
[Spark Capital](#)
[See More \(10\)](#)

 **Movile**
Movile is a leading global mobile commerce...
\$40M / Series E
Investors: [Naspers](#)

 **Recorded Future**
Recorded Future arms organizations with...
\$12M / Series D
Investors: [Google Ventures](#)
[Atlas Venture](#)

Crunchbase

Cost:
Free

Funding Rounds (6) - \$108.4M

UPDATE ▾



\$50M / Series F

Nov 16, 2011

Investors: [InterWest Partners](#)
[Institutional Venture Partners \(IVP\)](#)
[Storm Ventures](#)
[Mayfield Fund](#)
[Battery Ventures](#)



\$25M / Series E

Nov 17, 2010

Investors: [Institutional Venture Partners \(IVP\)](#)
[Storm Ventures](#)
[InterWest Partners](#)
[Mayfield Fund](#)



\$10M / Series D

Apr 27, 2010

Investors: [Mayfield Fund](#)
[InterWest Partners](#)
[Storm Ventures](#)



\$10M / Series C

Sep 22, 2009

Investors: [Mayfield Fund](#)



\$8M / Series B

Aug 12, 2008

Investors: [Storm Ventures](#)
[InterWest Partners](#)



\$5.4M / Series A

Oct 1, 2006

Investors: [InterWest Partners](#)



Cost:
\$25 mo.

Search ⓘ

Industries (ctrl-click for multiple)

- Advanced Materials
- Agriculture
- Alternative Energy
- Biotechnology
- Clean Tech

Regions

- USA
- Canada
- Northern California
- Southern California

Specific Company

Keyword

Funding Round

- Seed
- Series A
- Series B
- Series C

Transaction Type

- Venture Equity
- Crowdfunder
- M&A
- Debt

Investor Type

- Venture Capital
- Corporate
- Private Equity
- Accelerator

Date Range (mm/dd/yyyy) to

Amount Range to

City

State

Zip Code

Name this search

SEARCH ▶

SAVED SEARCHES

Use **Name** this search to save your 20 most recent searches here.

- 🔖 Devices Seed and Series A 4 yrs [Edit](#)
- 🔖 Med Device - Pumps 4 years [Edit](#)
- 🔖 Seed Alt Energy, CleanTech 13-14 [Edit](#)
- 🔖 Electronics A 13-14 [Edit](#)
- 🔖 Consumer+Ecommerce 2013-2015 [Edit](#)
- 🔖 Pharma 13-14 Seed-A [Edit](#)
- 🔖 2013 Seed SoCal [Edit](#)
- 🔖 Digital Media Execs SoCal [Edit](#)
- 🔖 Exits 2013 SoCal [Edit](#)
- 🔖 VC Class 2010 [Edit](#)
- 🔖 VC Class 2011 [Edit](#)
- 🔖 VC Class 2012 [Edit](#)
- 🔖 JD Industries CA Deals [Edit](#)
- 🔖 JD Industries CA Deals [Edit](#)
- 🔖 JD Industries CA Deals [Edit](#)
- 🔖 JD Industries CA Deals [Edit](#)
- 🔖 Pharma CA deals [Edit](#)
- 🔖 SoCal-Relevant Industries [Edit](#)
- 🔖 All SoCal Deals [Edit](#)
- 🔖 Digital Media SoCal - Deals [Edit](#)

SEARCH RESULTS

TRANSACTION SEARCH RESULTS

[< PREVIOUS SEARCH](#) | [SEARCH BY ALPHABET](#) ****All**** ▼

Transaction Record	Date	Industry	Round	Amount
<input type="checkbox"/> Insightera	12/13/2013	Digital Media	Undisclosed	Undisclosed
<input type="checkbox"/> Marketo	05/16/2013	IT	Undisclosed	\$79,300,000
<input type="checkbox"/> Marketocracy	12/31/2012	Financial Services	Undisclosed	\$250,000
<input type="checkbox"/> Crowd Factory	04/18/2012	Internet	Undisclosed	Undisclosed
<input type="checkbox"/> Marketo	11/16/2011	IT	Undisclosed	\$50,000,000
<input type="checkbox"/> Marketo	11/17/2010	IT	Undisclosed	\$25,000,000
<input type="checkbox"/> Marketo	04/27/2010	IT	Series C	\$10,000,000
<input type="checkbox"/> Marketo	06/30/2009	IT	Undisclosed	Undisclosed
<input type="checkbox"/> Marketo	08/12/2008	IT	Series B	\$8,000,000
<input type="checkbox"/> Marketo	06/30/2007	IT	Undisclosed	Undisclosed

NEW SEARCH ▶

Click checkboxes to download records in spreadsheet format.

 Or Select All 10 Records in Search

DOWNLOAD ▶

CLEAR DOWNLOAD QUEUE ▶

ADD FAVORITES ▶

VentureDeal

Cost:
\$25 mo.

VentureDeal

Cost:
\$25 mo.

Company Name  [Eloqua](#)

Status Acquired or Merged

Industry Software

Company Description Eloqua provides the leading integrated demand generation platform for marketers who must produce a continuous flow of quality leads for a professional sales force.

TRANSACTION DETAILS

Information Release Date 10/15/2007

Transaction Type Venture Equity

Amount Received \$23,000,000

Round Series C

Proceeds Purposes Proceeds purposes were not disclosed.

Transaction Investors

 **Bessemer Venture Partners**
(Lead Investor)

Byron Deeter

[in](#) [g](#) [t](#) [f](#)

 **JMI Equity**

Brad Woloson

[in](#) [g](#) [t](#) [f](#)

 **Bay Partners**

Neal Dempsey

[in](#) [g](#) [t](#) [f](#)



Angel List

Cost:
Free

Vast opportunities outside the US. We strive to become the leading loyalty platform outside the US.



bonusbox

A loyalty & incentive platform helping marketers to acquire, retain and target customers.

Hiring for 1 job · [Like](#) · [View](#) ▶



Reaction

Revolutionizing one of humanity's most basic needs: shelter.

Hiring for 5 jobs · [Like](#) · [View](#) ▶

Amrish Verma, Darius Vasefi, and 20 others are investing in Crew's round

8 hours ago



Crew

Creativity on demand.
Team went to Madison.

Hiring for 9 jobs · [Like](#) · [View](#) ▶

Arthur Watson liked Airdog

3 hours ago



Airdog

Auto-follow drone for action sports

[Like](#)

Ron Mahabir and Jason Wong are investing in Paige Craig's syndicate

31 minutes ago



Paige Craig's Syndicate

TRENDING STARTUPS

- Dil Mil
- Opstarts
- Crew
- Coneka
- Lofty

[SEE ALL](#) ▶

TRENDING SYNDICATES


\$ Last 7 Days


	Late stage Pre-IPO syndicate	\$580,000
	Expansion Venture Capital	\$362,500
	Raj Mehta	\$82,000
	FB Angels	\$80,000
	Gil Penchina	\$79,500
	Ad and Marketing Tech Syndicate	\$51,500

Angel List

Cost:
Free

No Stage Nov 16, 2011
\$50,000,000 [Read Press](#)

 **Battery Ventures**
VC Firm · Menlo Park

 **Institutional Venture Partners**
VC Firm · Menlo Park


[View all 5 investors from this round](#)

TECHCRUNCH.COM

[Eyeing An IPO In 2012, Sales And Marketing Software Dev...](#)

Marketo, a company that provides an on-demand marketing software that allows businesses to optimize their sales and marketing efforts, has raised \$50 million...

No Stage Nov 17, 2010
\$25,000,000 [Read Press](#)

 **Institutional Venture Partners**
VC Firm · Menlo Park

 **InterWest Partners**
VC Firm · Menlo Park, Ca

[View all 4 investors from this round](#)

FINSMES.COM

[FinSMEs | Marketo Secures \\$25M in Funding](#)

Marketo, a San Mateo, CA-based provider of Revenue Performance Management solutions, has secured \$25m in funding. The round was led by Institutional Venture...

Series D Apr 27, 2010
\$10,000,000 [Read Press](#)

 **InterWest Partners**
VC Firm · Menlo Park, Ca

 **Storm Ventures**
Seed Fund · Menlo Park

[View all 3 investors from this round](#)

Series C Sep 22, 2009
\$10,000,000 [Read Press](#)

Series B Aug 12, 2008
\$8,000,000 [Read Press](#)

 **InterWest Partners**
VC Firm · Menlo Park, Ca

 **Storm Ventures**
Seed Fund · Menlo Park

ONDEMANDBEAT.COM

[Marketo Receives 8 Million In Series B Funding](#)

Marketo; a San Mateo based provider of Business to Business marketing automation software, has received 8 million dollars in Series B funding from Storm...

Series A Oct 1, 2006
\$5,400,000 [Read Press](#)

 **InterWest Partners**
VC Firm · Menlo Park, Ca

CB Insights

Cost:
 \$1,199 mo.
 \$2,199 mo.
 \$2,999 mo.
 \$4,399 mo.

Marketo is a provider in Revenue Performance Management. Marketo's marketing automation and sales effectiveness apps transform how marketing and sales teams of all sizes work and work together, to drive increased revenue performance and fuel business growth. The company's technology, services and guidance are helping enterprise and mid-market companies around the world to turn marketing from a cos... Show all

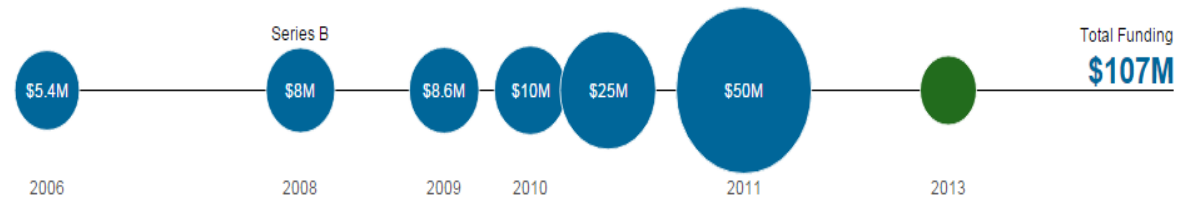
5 Investors All investors data

- Storm Ventures
- Mayfield Fund
- InterWest Partners
- Battery Ventures
- Institutional Venture Partners

Phone: 650-376-2300
 901 Mariners Island Blvd.
 Suite 200
 San Mateo, 94404
 California, United States

Company (IPO / Went public)

Go to Marketo's investor profile



Latest News

Apr 2015

23 articles

Taulia Presents at Marketo Conference

LookBookHQ's supercharged integration with Marketo empowers marketers to deliver personalized content and track real engagement

ion interactive Announces Sell-Side Experience to Foster Sales, Marketing & Buyer Alignment

Marketo Revolutionizes Marketers' Ability to Effortlessly Engage Customers Everywhere

Bluewolf Adds Multi-Channel Capabilities to Digital Marketing Practice With Percolate

Brightcove Announces Integration with Marketo to Help Marketers Amplify the Power of Video Marketing

Marketo Customers Can Now Use InsideView Target Social and Business Insights to Create More Targeted Marketing Campaigns

Insightpool Launches Marketo Integration to Enhance End-to-End

vb Martech + adtech + salestech: Marketo unifies prospect, customer (and mobile) engagement

PaySimple Awarded Marketing Team of the Year by Marketo

Marketo and Turn Power Smarter Prospecting, Deliver Dramatic Customer Results

Ken Wincko Shares the 7 Steps to Achieve Demand Generation Success at the Marketo Summit

Marketo : Brightcove Announces Integration with Marketo to Help Marketers Amplify the Power of Video Marketing

Marketo Customers Can Now Use InsideView Target Social and Business Insights to Create More Targeted Marketing Campaigns

Marketo : to Report First Quarter 2015 Financial Results on April 23, 2015

Qualtrics Announces Marketo Integration, Enabling Marketers to

Similar Companies

See more similar companies data

	Total Funding	Months since last funding
Marketo IPO / Went public	\$107M	41 months
HubSpot IPO / Went public	\$100.5M	29 months
Silverpop Acquired	\$73.5M	24 months
Aprimo Acquired	\$46.5M	114 months
LeadRocket Acquired	\$41.1M	49 months
Eloqua Acquired	\$40.8M	90 months
Neolane Acquired	\$33.6M	39 months
LoopFuse Acquired	\$1.4M	74 months

Industry Trends

See more industry trends data

	Deals over 5 years	Deals last year	Funding over 5 years	Funding last year
Advertising, Sales & Marketing		371		\$1.73bn
California		3,654		\$39bn

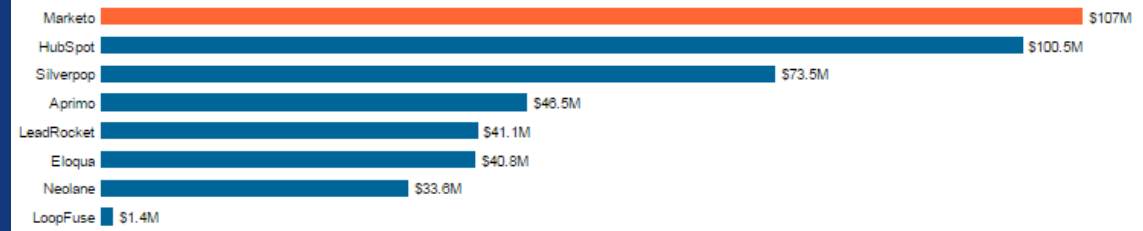
CB Insights

Cost:
 \$1,199 mo.
 \$2,199 mo.
 \$2,999 mo.
 \$4,399 mo.

Trends in Marketo's Industries & Geographies



Similar Companies



Company	Status	Description	Investors
HubSpot Cambridge, Massachusetts, United States	IPO / Went public	HubSpot is an inbound marketing system that helps small or medium sized business to get found on the Internet by the right prospects and convert more of them into leads and customers. HubSpot inbound marketing aims to help their company get found by ...	Altimeter Capital, Cross Creek Advisors, CRV, Dharmesh Shah, General Catalyst Partners, Google Ventures, Matrix Partners, Salesforce Ventures, Scale Venture Partners, Sequoia Capital and Tenaya Capital
Silverpop Atlanta, Georgia, United States	Acquired	Silverpop is a digital marketing technology provider that unifies marketing automation, email, mobile, and social. Its customers achieve superior Return on Relationship by engaging each individual based on their behaviors and then automating personal...	ATEL Ventures, D.E. Shaw & Co., DFJ ePlanet Ventures, Draper Fisher Jurvetson, Escalate Capital Partners, Gray Ventures, Imlay Investments, Labrador Ventures, Lakes Venture Group II, NeoCarta Ventures, Silicon Valley Bank and Wolverine Venture Fund
Aprimo Indianapolis, Indiana, United States	Acquired	Aprimo Inc. develops solutions that help marketers manage the business of marketing within an organization and across all external marketing contacts. Aprimo Marketing, a Web-based marketing management solution, aims to facilitate strategic decision...	Blue Chip Venture Company, First Analysis Group, Frazier Technology Ventures, JEGI Capital, MK Capital and Sigma Partners
LeadRocket Redwood City, California, United States	Acquired	LeadRocket, formerly Geinus, is a social engagement and digital marketing platform provider. Built from the ground up in the cloud, LeadRocket sales tools are designed with the user in mind, bringing information from a wide variety of sources (like F...	Accel Partners, Deep Fork Capital, Emergence Capital Partners, Mohr Davidow Ventures, Walden International and Western Technology Investment
Eloqua Vienna, Virginia, United States	Acquired	Eloqua is a provider of on-demand Revenue Performance Management, or RPM, software solutions that are designed to enable businesses to accelerate revenue growth and improve revenue predictability by automating, monitoring and measuring complex market...	Bay Partners, Bessemer Venture Partners, Industry Ventures, JMI Equity and Larry Augustin
Neolane Newton,	Acquired	Neolane provides conversational marketing technology that empowers organizations to build and sustain one-to-one lifetime dialogues, increasing revenue and marketing efficiency. Neolane is easy to use for	Auriga Partners, Battery Ventures, Gilles Queru and Xange Capital

Table with columns: Name, Amount, Date, Firm, Location, Contact, Website, Bio, etc. Contains a large list of investor profiles.

Scrub Lots of Deals Skim Bios of Investors: PEOPLE more than FIRMS

Rank them A, B, C
Brief notes re: why

Include hyperlinks to:
LinkedIn Profiles
AngelList Profiles
Website Bios
(as appropriate)

Table with columns: Name, Amount, Date, Firm, Location, Contact, Website, Bio, etc. Contains a smaller list of investor profiles.

Making your list

STEP 4

SIFT DOWN TO
YOUR CUSTOM
SHORTLIST

Example Shortlist: eCommerce

SmartMoney Target Investor Research List

<u>Company Name and</u>	<u>Financing Round</u>	<u>Financing Amount</u>	<u>Investor Company</u>	<u>Investor Name</u>	<u>Priority</u>	<u>AngelList Profile</u>	<u>LinkedIn Profile</u>
Milo	Series A	4M	Individual Angel	Aaror	A - Founder, CEO Milo	https://angel.c	https://www.linkedin.com/in/ap
Milo		N/A - Exec	Fmr CEO - Milo	Jack A	A - fmr CEO Milo - 6 angel deals	https://angel.co	https://www.linkedin.com/in/jac
Kayak	Series A	\$8.5M	Kayak - fmr CoFounder	Paul I	A - fmr Kayak Co-Founder	https://angel.co	https://www.linkedin.com/in/
Kayak	Series A	\$8.5M	Kayak - fmr CoFounder	Bill O'Donnell	A+	https://angel.co	https://www.linkedin.com/in/
Kayak	Series A	\$8.5M	Fmr General Catalyst	Nite...	A+	https://angel.co	https://www.linkedin.com/in/
Kayak	Series A	\$8.5M	Individual Angel	Somes...	A+	https://angel.co	https://www.linkedin.com/in/
ShopSavvy	Seed		Individual Angel	Alexander	A - fmr CEO, ShopSavvy	N/A	https://www.linkedin.com/in/an
ShopSavvy	Seed	.700M	Architel LP	Scott	Discuss - CoFounder ShopSavvy	https://angel.co	https://www.linkedin.com/in/sc
ShopSavvy	Seed	.700M	Individual Angel	Scott	Discuss - CoFounder ShopSavvy	https://angel.co	https://www.linkedin.com/in/sc
Square	Series A	\$10M	Individual Angel	Robin	A Competitor - CEO Operator?	https://angel.co	https://www.linkedin.com/in/ro
ShopSavvy	Seed	.700M	Canyon Creek Capital	Buck Jordan	A (Bridge to the A Round)	https://angel.co	https://www.linkedin.com/in/bu
BlueCava	Seed	\$1.5M	Individual Angel	Mark Cuban	A - Active	https://angel.co	v.linkedin.com/in/mark-cubar
BlueCava	Series A	\$5M	Mark Cuban Companies	Omar	A - Active	https://angel.co	https://www.linkedin.com/in/omarage
Square	Series A	\$10M	Individual Angel	Josh	A - Active Angel	https://angel.co	https://www.linkedin.com/in/jos
Wish	Seed		Caffeinated Capital	Rayn	A - Active angel	https://angel.co	https://www.linkedin.com/in/
Purch	Series B	\$33M	Highway 12 Ventures	Mark	A - just recently left Purch Board	https://angel.co	https://www.linkedin.com/in/m
Purch	Series A2	\$1.5M	Highway 12 Ventures	Mark	A - just recently left Purch Board	https://angel.co	https://www.linkedin.com/in/m
Purch	Series A	\$6M	Highway 12 Ventures	Mark	A - just recently left Purch Board	https://angel.co	https://www.linkedin.com/in/m
CEO of eBates - huge exit with little capital investment				Kevin Johnson	A - possibly	N/A	https://www.linkedin.com/in/kevinhjo
Jet	Seed	\$4.9M	Individual Angel	David	A - Young, Active Angel	https://angel.co	https://www.linkedin.com/in/

Active eCommerce Investors:

Do these people know that your company exists?

Working your list

STEP 5

Ask for Warm Introductions from:

Existing Investors
Prior portfolio CEOs
Advisory Board
Mentors / Advisors

Smart Networking

VERY IMPORTANT

**This process requires a
time investment.**

You WILL get an ROI on every hour
you invest in research

SmartMoney Pitch Meetings are
MUCH MORE EFFICIENT

Homework

1. Start your Market Map
(Excel Spreadsheet Template)
2. Begin your research
3. Schedule call w/Luis

Luis@SmartMoneyStartups.com

Q & A



NEXT STEP

SMARTMONEY

STARTUPS

The RIGHT Investors

In the RIGHT DEALS

At the RIGHT TIME