

**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



# Program Schedule

## Live Webinar Sessions:

- Tuesday, March 7, 9-10:30AM Pacific** Module 1: Introduction & Market Mapping  
**Tuesday, March 14, 9-10:30AM Pacific** Module 2: Targeting Deals & Investors  
**Tuesday, March 21, 9-10:30AM Pacific** Module 3: Fundraising Campaign Roadmap  
**Tuesday, March 28, 9-10:30AM Pacific** Module 4: Email Templates & Investor Readiness Scorecards

## Live AMA Sessions

### Ask Me Anything:

- Thursday, March 9, 9-10:30AM Pacific** Ask Me Anything Session  
**Thursday, March 16, 9-10:30AM Pacific** Ask Me Anything Session  
**Thursday, March 23, 9-10:30AM Pacific** Ask Me Anything Session  
**Thursday, March 30, 9-10:30AM Pacific** Ask Me Anything Session

# 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 Mar 2017



Steve McCloskey



Keita Funakawa



Edgardo Leija



Rich Goldman



Surra Yanamadala



Meena Sankaran



Tom Saftig



Kevin Harris



Chad Tytten



Corey Taylor

# Fundraising Sprint Components

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

# 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

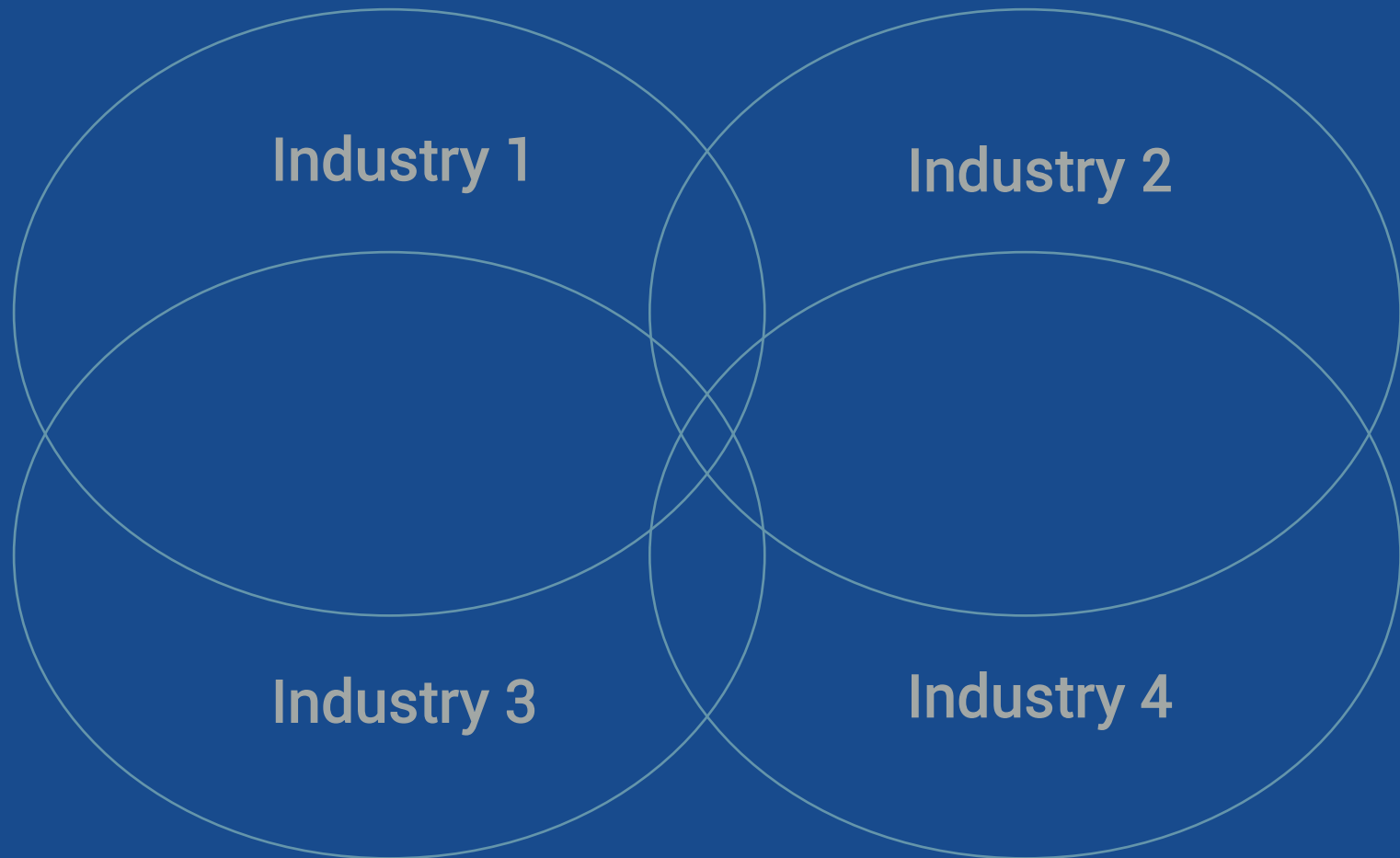
Market Map

Relevant Deals

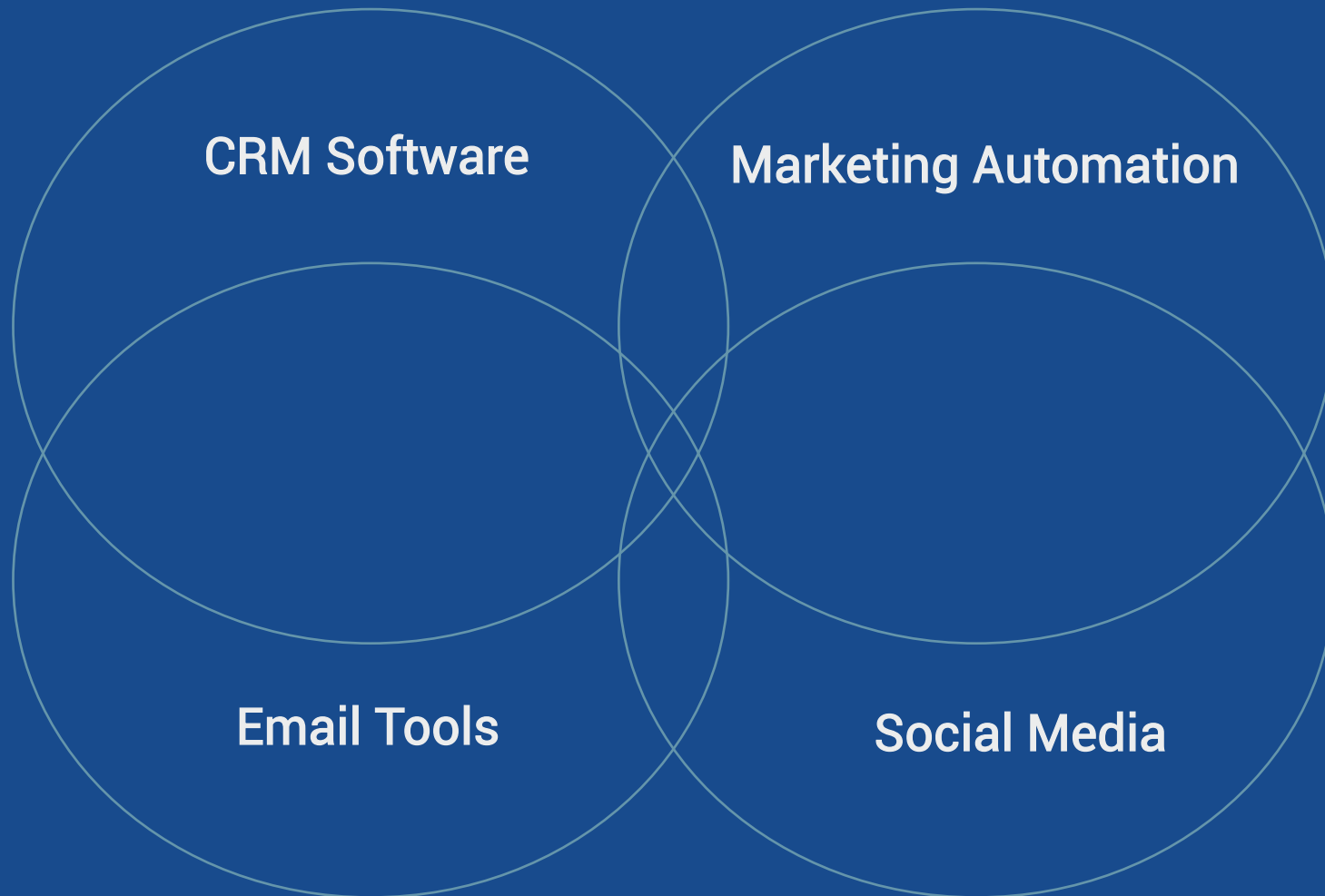
Relevant Investors



# Industry Convergence



# Industry 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

<b>SmartMoney Target Investor Research List</b>						
<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	

Company	Investor	Amount	Date	Deal Type	Investor Type	Investor Name	Investor Address	Investor Phone	Investor Email	Investor Website	Investor LinkedIn	Investor Facebook	Investor Twitter	Investor YouTube	Investor Instagram	Investor Other	Notes
XXX	XXXX	\$1.0M	10/23/15	Series A	Individual Angel	John Smith	123 Main St	555-555-1234	john@smith.com	http://johnsmith.com	johnsmith	johnsmith	johnsmith				Lead investor
XXX	XXXX	\$500K	04/22/16	Series A	Individual Angel	Jane Doe	456 Park Ave	555-555-5678	jane@doe.com	http://janedoe.com	janedoe	janedoe	janedoe				Lead investor
XXX	XXXX	\$1.5M	08/15/16	Series B	VC Firm	Acme Capital	789 Capital Dr	555-555-9012	info@acmecap.com	http://acmecap.com	acmecap	acmecap	acmecap				Lead investor

Understand your environment

Do your homework:  
Invest in the Research

Scrub ~ 200 Names

Note relevant strategic  
connections to YOUR deal

Gain Deep Industry Knowledge

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

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

	INDUSTRY 1	INDUSTRY 2	INDUSTRY 3	INDUSTRY 4
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

	INDUSTRY 1	INDUSTRY 2	INDUSTRY 3	INDUSTRY 4
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 ▾

<b>SERIES F</b>	<b>\$50M / Series F</b> Nov 16, 2011 Investors: InterWest Partners Institutional Venture Partners (IVP) Storm Ventures Mayfield Fund Battery Ventures
<b>SERIES E</b>	<b>\$25M / Series E</b> Nov 17, 2010 Investors: Institutional Venture Partners (IVP) Storm Ventures InterWest Partners Mayfield Fund
<b>SERIES D</b>	<b>\$10M / Series D</b> Apr 27, 2010 Investors: Mayfield Fund InterWest Partners Storm Ventures
<b>SERIES C</b>	<b>\$10M / Series C</b> Sep 22, 2009 Investors: Mayfield Fund
<b>SERIES B</b>	<b>\$8M / Series B</b> Aug 12, 2008 Investors: Storm Ventures InterWest Partners
<b>SERIES A</b>	<b>\$5.4M / Series A</b> Oct 1, 2006 Investors: InterWest Partners

# SEARCH



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](#)
- 🔖 JD Industries CA Deals [Edit](#)
- 🔖 Pharma CA deals [Edit](#)
- 🔖 SoCal-Relevant Industries [Edit](#)
- 🔖 All SoCal Deals [Edit](#)
- 🔖 Digital Media SoCal - Deals [Edit](#)

# VentureDeal

Cost:  
\$25 mo.



## TRANSACTION SEARCH RESULTS

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

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

**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
- Conekta
- 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.

Dashboard
Performance
Financing
People
Tech Stack
Industry Trends & Comps

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](#)

Company (IPO / Went public) [Go to Marketo's investor profile](#)

Year	Funding Amount
2006	\$5.4M
2008	\$8M
2009	\$8.6M
2010	\$10M
2011	\$25M
2011	\$50M
2013	-
<b>Total</b>	<b>\$107M</b>

**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

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**Latest News** [23 articles](#)

**Apr 2015**

- 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

- 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 <a href="#">IPO / Went public</a>	\$107M	41 months
HubSpot <a href="#">IPO / Went public</a>	\$100.5M	29 months
Silverpop <a href="#">Acquired</a>	\$73.5M	24 months
Aprimo <a href="#">Acquired</a>	\$46.5M	114 months
LeadRocket <a href="#">Acquired</a>	\$41.1M	49 months
Eloqua <a href="#">Acquired</a>	\$40.8M	90 months
Neolane <a href="#">Acquired</a>	\$33.6M	39 months
LoopFuse <a href="#">Acquired</a>	\$1.4M	74 months

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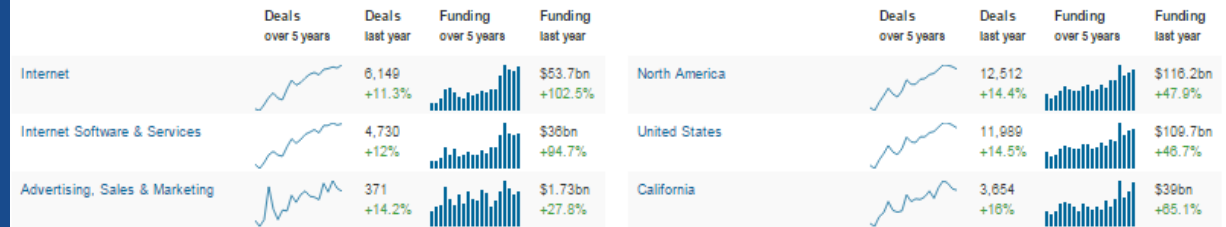
**Industry Trends** [See more industry trends data](#)

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

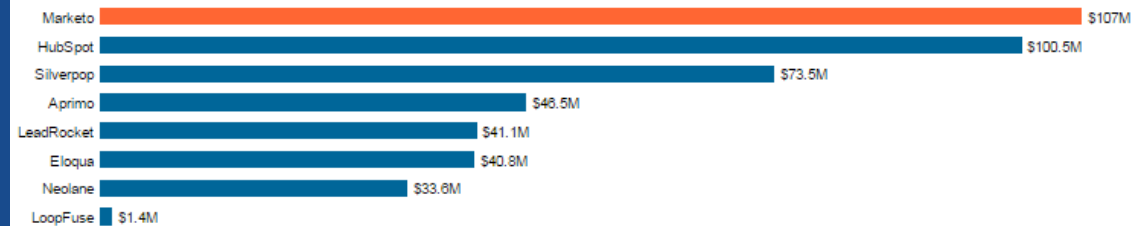
# CB Insights

**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

SmartMoney Target Investor Research List												
Company	Investor Name	Investor Type	Investor Email	Investor Phone	Investor Website	Investor Address	Investor City	Investor State	Investor Zip	Investor LinkedIn	Investor Bio	Investor Status
Academy Sports + Outdoors	Academy Sports + Outdoors	Investor	Academy Sports + Outdoors	Academy Sports + Outdoors	Academy Sports + Outdoors	Academy Sports + Outdoors	Academy Sports + Outdoors	Academy Sports + Outdoors	Academy Sports + Outdoors	Academy Sports + Outdoors	Academy Sports + Outdoors	Academy Sports + Outdoors
Adapt Biotech	Adapt Biotech	Investor	Adapt Biotech	Adapt Biotech	Adapt Biotech	Adapt Biotech	Adapt Biotech	Adapt Biotech	Adapt Biotech	Adapt Biotech	Adapt Biotech	Adapt Biotech
Adaptive Biotech	Adaptive Biotech	Investor	Adaptive Biotech	Adaptive Biotech	Adaptive Biotech	Adaptive Biotech	Adaptive Biotech	Adaptive Biotech	Adaptive Biotech	Adaptive Biotech	Adaptive Biotech	Adaptive Biotech
Adidas	Adidas	Investor	Adidas	Adidas	Adidas	Adidas	Adidas	Adidas	Adidas	Adidas	Adidas	Adidas
Adipex	Adipex	Investor	Adipex	Adipex	Adipex	Adipex	Adipex	Adipex	Adipex	Adipex	Adipex	Adipex

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)

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

## 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](mailto:Luis@SmartMoneyStartups.com)

Q & A



# SMARTMONEY

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## *STARTUPS*

The RIGHT Investors  
In the RIGHT DEALS  
At the RIGHT TIME