

# BD & Outreach Email Templates

Cold email and LinkedIn templates for finance professionals, firms, and founders.

## How to use these templates

Replace every [BRACKET] with specific, researched information. The more specific you are, the higher your reply rate. A generic email about "synergies" gets deleted. A specific email about their last investment or their target market gets a reply.

Each section has: First touch → Follow up Day 5 → Final touch Day 10 → LinkedIn connection note.

**SECTION 1 — BOUTIQUE IB & ADVISORY FIRM → FOUNDERS & PROMOTERS (for mandates)**

*Use when: Your IB firm is looking for fundraising, M&A, or debt mandates from founders and promoters.*

### Email 1 — First Touch

<b>Subject Line</b>	Quick question about [COMPANY NAME]'s growth plans
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>I came across [COMPANY NAME] — [ONE SPECIFIC THING: a recent funding round, a product launch, a news article, a LinkedIn post].</p> <p>We are a boutique [investment banking / financial advisory] firm focused on [their sector — fintech / consumer / B2B SaaS]. We have recently worked on [a specific type of transaction — debt raises / equity rounds / M&amp;A;] for companies at a similar stage.</p> <p>Quick question: is [raising growth capital / exploring strategic options / optimising your capital structure] something on your agenda in the next 6-12 months?</p> <p>Even if the timing isn't right now, happy to share what we are seeing in the market.</p> <p>[YOUR NAME] [FIRM NAME]   [YOUR LINKEDIN]</p>
<b>Why it works</b>	<i>Opens with proof of research. One question only. No pitch until they respond. Mentions a relevant transaction type.</i>

### Email 2 — Follow Up Day 5

<b>Subject Line</b>	Re: Quick question about [COMPANY NAME]'s growth plans
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<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>Following up on my note from last week.</p> <p>One thing worth sharing — [a relevant market insight: e.g. "debt capital for [their sector] is more available right now than it has been in 18 months" or "we are seeing 2-3 M&amp;A; conversations per month in [their space]"].</p> <p>Happy to share a quick overview of what we are working on and what similar companies are doing on the capital side.</p> <p>Worth 20 minutes?</p> <p>[YOUR NAME]</p>
<b>Why it works</b>	<i>Adds new value — a market insight. Does not repeat the pitch. Short.</i>

### Email 3 — Final Touch Day 10

<b>Subject Line</b>	One specific idea for [COMPANY NAME]
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>Last note from me.</p> <p>I had a specific thought about [COMPANY NAME]'s situation — [one sentence idea: e.g. "given your revenue trajectory, a structured debt facility could fund expansion without dilution at this stage"].</p> <p>If the timing isn't right, no problem — happy to reconnect when it makes sense.</p> <p>[YOUR NAME]   [PHONE]   [LINKEDIN]</p>
<b>Why it works</b>	<i>Creates curiosity with a specific idea. Gives a graceful exit. Often gets replies from people who ignored earlier emails.</i>

### LinkedIn Connection Note

<b>Subject Line</b>	— (No subject for LinkedIn)
<b>Email Body</b>	Hi [FIRST NAME] — came across [COMPANY NAME] and your work in [their space]. Would love to connect — we work with founders at your stage on [fundraising / capital strategy / M&A;].
<b>Why it works</b>	<i>Under 300 characters. One specific reference. No pitch.</i>

### LinkedIn Follow Up After Connecting

<b>Subject Line</b>	— (Direct message)
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<b>Email Body</b>	Thanks for connecting [FIRST NAME]. We recently helped a [similar company in their sector] [specific outcome — raise ■X in debt / close an acquisition / restructure their cap table]. Happy to share what worked for them if useful for where [COMPANY NAME] is headed.
<b>Why it works</b>	<i>Leads with a result, not a service. Specific. Invites a response without asking for a meeting.</i>

## SECTION 2 — EARLY STAGE VC FUND → STARTUPS (for deal flow)

*Use when: Your fund is proactively sourcing deals in a specific sector or stage.*

### Email 1 — First Touch

<b>Subject Line</b>	Following [COMPANY NAME]'s progress — quick note
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>I have been following [COMPANY NAME] — [specific thing: a product launch, a metric you saw mentioned, a founder post on LinkedIn].</p> <p>We invest in [seed / pre-Series A] stage [sector] companies in India. [ONE LINE on your thesis: e.g. "We back founders building infrastructure for the \$X market" or "We focus on B2B SaaS solving for [pain point]"].</p> <p>[COMPANY NAME] looks like it could be relevant to what we are tracking.</p> <p>Are you currently in conversations with investors, or is this something you are thinking about in the next few months?</p> <p>[YOUR NAME] [FUND NAME]   [PORTFOLIO LINK or LINKEDIN]</p>
<b>Why it works</b>	<i>Sounds like genuine interest, not a mass email. Asks about their timeline, not for a pitch. Shows you have a thesis.</i>

### Email 2 — Follow Up Day 5

<b>Subject Line</b>	Re: Following [COMPANY NAME]'s progress
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>Just following up.</p> <p>We recently invested in [a portfolio company in a related space — optional to share] and one thing that stood out was [relevant insight for the founder].</p> <p>Happy to share our thinking on [their sector] if useful — even if the timing for investment isn't right now.</p> <p>[YOUR NAME]</p>

<b>Why it works</b>	<i>Uses portfolio to demonstrate credibility. Offers value even without a deal. Keeps the door open.</i>
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### Email 3 — Final Touch Day 10

<b>Subject Line</b>	One question for [FIRST NAME]
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>Last note from me.</p> <p>One question: what does your ideal investor look like for the next round? Not asking to pitch — genuinely curious, and it would help me know whether [FUND NAME] is worth your time.</p> <p>[YOUR NAME]</p>
<b>Why it works</b>	<i>Reverses the dynamic. Asks what they want instead of pitching what you offer. High response rate.</i>

### LinkedIn Note

<b>Subject Line</b>	— (LinkedIn connection request)
<b>Email Body</b>	<p>Hi [FIRST NAME] — been following [COMPANY NAME]'s work in [space]. We invest at [stage] in [sector] — would love to stay connected even if the timing for a conversation is not right now.</p>
<b>Why it works</b>	<i>Non-pushy. Long-game approach. Founders remember funds that do not chase them.</i>

## SECTION 3 — NBFC / LENDING FIRM → COMPANIES (for lending relationships)

*Use when: Your NBFC or lending firm is looking for borrowers — startups, SMEs, or growth-stage companies.*

### Email 1 — First Touch

<b>Subject Line</b>	Working capital / growth financing for [COMPANY NAME]
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<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>I came across [COMPANY NAME] — [specific observation: revenue growth, a recent expansion, a job posting that signals growth].</p> <p>We work with [growth-stage / bootstrapped / VC-backed] companies in [their sector] on structured debt — [working capital / term loans / revenue-based financing / invoice discounting].</p> <p>A lot of founders at your stage use debt to fund growth without diluting equity. Depending on your current financials, you may qualify for [■X to ■Y Cr] at competitive rates.</p> <p>Worth a 20-minute call to see if there's a fit?</p> <p>[YOUR NAME] [FIRM NAME]   [YOUR CONTACT]</p>
<b>Why it works</b>	<i>Leads with the benefit (non-dilutive). Gives a range to create curiosity. Specific to their stage.</i>

## Email 2 — Follow Up Day 5

<b>Subject Line</b>	Re: Growth financing for [COMPANY NAME]
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>Following up on my previous note.</p> <p>One thing worth knowing — [relevant market point: e.g. "RBI guidelines have made debt more accessible for [sector] companies in the last 12 months" or "we are currently processing applications faster than usual due to a new facility we closed"].</p> <p>Happy to do a quick eligibility check over a call — no paperwork needed at this stage.</p> <p>[YOUR NAME]</p>
<b>Why it works</b>	<i>Creates urgency without being pushy. Reduces friction with "no paperwork needed".</i>

## Email 3 — Final Touch Day 10

<b>Subject Line</b>	Quick eligibility question for [COMPANY NAME]
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<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>Last note from me.</p> <p>One quick question: does [COMPANY NAME] have a minimum of [■X Cr] in annual revenue and [X] months of operating history? If yes, you likely qualify for our [product name] and I can share the structure in 10 minutes.</p> <p>If the timing isn't right, happy to reconnect later.</p> <p>[YOUR NAME]   [PHONE]</p>
<b>Why it works</b>	<p><i>Turns the last email into a qualification question. Forces a yes/no answer. Very effective.</i></p>

**LinkedIn Note**

<b>Subject Line</b>	<p>— (LinkedIn)</p>
<b>Email Body</b>	<p>Hi [FIRST NAME] — I work with [sector] companies at your stage on structured debt solutions. [COMPANY NAME]'s growth trajectory looks interesting. Would love to connect.</p>
<b>Why it works</b>	<p><i>Brief. Compliments their growth. No hard pitch.</i></p>

**SECTION 4 — INDIVIDUAL FINANCE PROFESSIONAL → ADVISORY CLIENTS**

*Use when: A senior banker, CFO, or financial advisor is building an independent advisory practice.*

**Email 1 — First Touch**

<b>Subject Line</b>	<p>A thought on [COMPANY NAME]'s financial strategy</p>
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>I came across [COMPANY NAME] while [researching your sector / reading about your recent round / seeing your LinkedIn post].</p> <p>I work as an independent [CFO / financial advisor / IB professional] with [X years] in [cross-border fintech / debt markets / investment banking]. I typically work with [stage] companies on [specific: fundraising strategy / financial modelling / CFO services / debt structuring].</p> <p>One observation about [COMPANY NAME]: [one specific, genuine insight — e.g. "your cash conversion cycle could be optimised before your next fundraise" or "your revenue model would be well suited for a structured debt facility"].</p> <p>Worth a conversation?</p> <p>[YOUR NAME]   [LINKEDIN]</p>

<b>Why it works</b>	<i>Leads with a specific insight about their business. Shows you did your homework. Credentials upfront but brief.</i>
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## Email 2 — Follow Up Day 5

<b>Subject Line</b>	Re: Financial strategy for [COMPANY NAME]
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>Following up on my note.</p> <p>I recently helped a [similar company] with [specific outcome — e.g. "preparing their data room for a Series A" / "structuring a ■5Cr debt facility" / "building their investor reporting framework"].</p> <p>Happy to share what worked for them — no engagement needed, just a conversation.</p> <p>[YOUR NAME]</p>
<b>Why it works</b>	<i>Social proof with a specific outcome. Removes commitment anxiety.</i>

## Email 3 — Final Touch

<b>Subject Line</b>	One specific thought for [COMPANY NAME]
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>Last note from me.</p> <p>One thing I have been thinking about for [COMPANY NAME]: [specific idea relevant to their situation].</p> <p>If it's not relevant right now, no problem. Happy to reconnect when the timing is better.</p> <p>[YOUR NAME]   [PHONE]   [LINKEDIN]</p>
<b>Why it works</b>	<i>The specific idea creates curiosity. Always gets some responses even after silence.</i>

## SECTION 5 — FOUNDERS → ANGELS & VC FUNDS (for fundraising)

*Use when: You are a founder actively raising a seed or Series A round from angel investors or VC funds.*

### Email 1 — Angel Investor First Touch

<b>Subject Line</b>	Raising seed for [COMPANY NAME] — quick intro
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<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>I am [YOUR NAME], founder of [COMPANY NAME]. We [one line on what you do and who you serve].</p> <p>I came across your profile — [specific: a portfolio company of theirs, a LinkedIn post they wrote, a panel they spoke at]. Your investment in [COMPANY/SECTOR] suggests you understand [the specific problem we solve].</p> <p>We are raising [■X Cr] at [pre-money valuation] to [specific use of funds — hire GTM team / expand to 3 cities / build X feature].</p> <p>Current traction: [ONE SPECIFIC METRIC — e.g. "■X Lakh MRR, 3x YoY growth" or "2,000 paying users, 85% retention"].</p> <p>Would you be open to a 20-minute intro call?</p> <p>[YOUR NAME]   [YOUR LINKEDIN]   [DECK LINK — optional]</p>
<b>Why it works</b>	<i>Leads with traction, not the idea. Shows you researched them. One specific metric. One ask.</i>

## Email 1 — VC Fund First Touch

<b>Subject Line</b>	[COMPANY NAME] — [SECTOR] startup raising [STAGE]
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>I am [YOUR NAME], co-founder of [COMPANY NAME]. We [one line on what you do].</p> <p>I noticed [FUND NAME] invested in [a portfolio company in a related space]. [COMPANY NAME] operates in an adjacent space — [explain how you are related or complementary].</p> <p>Quick stats:</p> <ul style="list-style-type: none"> <li>— [MRR or ARR]</li> <li>— [Growth rate]</li> <li>— [Key metric relevant to your sector]</li> </ul> <p>We are raising [■X Cr / \$XM] at [valuation/SAFE cap] for [use of funds].</p> <p>Would it make sense to connect for 20 minutes?</p> <p>[YOUR NAME] [DECK LINK — optional]</p>
<b>Why it works</b>	<i>Connects to their portfolio — shows you researched them. Stats upfront in bullet format — easy to scan. One ask.</i>

## Follow Up Day 5 — No Reply

<b>Subject Line</b>	Re: [COMPANY NAME] — [STAGE] raise
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<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>Following up on my note from last week.</p> <p>One update since I wrote: [something that has happened — a new customer, a metric improvement, a new team member, a partnership]. Wanted to share in case it is relevant to your decision.</p> <p>Still happy to do a quick 20-minute intro call if the timing works.</p> <p>[YOUR NAME]</p>
<b>Why it works</b>	<p><i>Shows momentum. Investors fund companies that are moving. Never follow up without adding new information.</i></p>

### Final Touch Day 10

<b>Subject Line</b>	<p>Last note — [COMPANY NAME]</p>
<b>Email Body</b>	<p>Hi [FIRST NAME],</p> <p>Last note from me on this raise.</p> <p>We are closing this round by [DATE]. If [FUND NAME]'s typical timeline doesn't work for this, happy to keep you updated on our next milestone and reconnect then.</p> <p>Either way — would love to stay connected.</p> <p>[YOUR NAME]</p>
<b>Why it works</b>	<p><i>Creates a soft deadline. Gives a graceful exit. Leaves the door open for future rounds.</i></p>

### LinkedIn Note to Angel/VC

<b>Subject Line</b>	<p>— (LinkedIn connection request)</p>
<b>Email Body</b>	<p>Hi [FIRST NAME] — I am building [COMPANY NAME] in [sector]. Currently raising seed and noticed your investment thesis aligns with what we are working on. Would love to connect.</p>
<b>Why it works</b>	<p><i>Short. Specific. Not a pitch. Just a connection.</i></p>

### Cold Intro Request via Mutual Connection

<b>Subject Line</b>	<p>Quick favour — intro to [INVESTOR NAME]</p>
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<b>Email Body</b>	<p>Hi [MUTUAL CONNECTION NAME],</p> <p>Hope you are well.</p> <p>I am currently raising seed for [COMPANY NAME] — [one line on what we do and key traction metric].</p> <p>I noticed you are connected to [INVESTOR NAME] at [FUND]. Would you be comfortable making a quick intro? I would send you a short blurb you could forward.</p> <p>No pressure at all if it's not a good fit — just thought I would ask.</p> <p>[YOUR NAME]</p>
<b>Why it works</b>	<p><i>Warm intros convert 5-10x better than cold emails. Always pursue warm intros first. Make it easy for them by offering to write the blurb.</i></p>

## Universal Rules for All Cold Outreach

<b>Research before you write</b>	Every email should have at least ONE thing that proves you looked at their specific company, portfolio, or LinkedIn. Generic emails get ignored.
<b>Subject line is everything</b>	Keep it under 7 words. No "Partnership opportunity" or "Quick question". Use their company name or a specific hook.
<b>One ask per email</b>	Do not ask for a meeting AND a deck review AND feedback all in one email. One call to action only.
<b>Metrics beat adjectives</b>	"\$50L MRR, 3x YoY" is better than "fast-growing startup". Specificity builds credibility.
<b>Follow up 3 times maximum</b>	Day 1, Day 5, Day 10. After 3 touchpoints with no reply — move on. Come back in 3 months with new traction.
<b>Add value in every follow up</b>	Never send "just following up". Every follow up must add something new — a metric, an insight, a relevant news item.
<b>LinkedIn + Email together</b>	Connect on LinkedIn the same day you send the first email. Two touchpoints on different channels increases reply rate significantly.
<b>Personalise at scale with a system</b>	Build a simple Google Sheet. Columns: Name, Company, Research Note, Email Sent Date, Reply, Follow Up 1, Follow Up 2. Track everything.

Want LinkedIn content that makes these cold emails warmer? [sastavc.com](http://sastavc.com)