

## How to Market Your Investment Crowdfunding Campaign

Here are some tips from two experts, Dan Rosenberg of [Real Pickles](#) and Marty Gay of [Quimper Mercantile](#).

### 1. Plan your marketing campaign in advance

- What messaging will you use? What will resonate with your potential investors?
- Who and where are your potential investors and how will you target them?
- Start building your network of supporters and fans as early as possible – both online and face to face.
- Make a list of potential investors that you already know – think of both wealthy and non-wealthy individuals, nonprofit organizations, foundations, businesses . . .
- Talk to leaders in your community and ask for their advice – if possible, talk to others who have conducted successful capital raising and nonprofit fundraising campaigns.
- Get advice from organizations that have run successful DPOs.
- Plan at least one event for potential investors.
- Use an email program like [Constant Contact](#) to plan an email marketing campaign in advance – once your offering is approved you should send out an email to your constituency at least once every few weeks.
- If you're not using a Title III crowdfunding intermediary, create a web-based platform that allows potential investors to look at your offering materials (example: <https://peoplescommunitymarket.com/buy-shares/>).
- Consider making or linking to an existing short video to inspire potential investors. Here is an [example](#) of a video about a DPO in Powell, WY that one of my clients used.

### 2. Run your campaign!

- Reach out one-on-one to potential investors.
- Send email updates on your progress every week or two.
- Hold special events such as
  - Factory tours
  - Investor briefings
  - Road shows at various locations throughout the states where you are authorized to make your offering
  - Events co-sponsored with supportive organizations like your local [Slow Money](#) or [BALLE](#) group
  - In-store tastings and demos
- Make sure people hear about the offering from multiple sources – ask others to spread the word in their own newsletters, blogs, social media, etc.
- Send out press releases.

- Update your web site regularly with your progress.
- If you're raising under Title III, make sure to follow the rules about what you can and can't say about your offering outside of the intermediary platform. If you're doing a state-regulated DPO, you may be required to clear all advertising materials with the state before using them – make sure you know the requirements before disseminating any advertising materials.

### More Tips

- Don't make assumptions about how much money any particular person is able to invest – you may be surprised!
- DPOs are about trust and relationships – don't rely on professional fundraisers – YOU and your colleagues need to tell the story to potential investors.
- Focus on the positive, but remind people that Wall Street is a rollercoaster with a long-run average annual return of less than 3%.
- Make sure people know that they can invest retirement funds in a DPO using a [self-directed IRA](#).
- If you have existing marketing and sales staff, involve them in the DPO offering process – a DPO is about marketing your organization and that is what these people know how to do! But be sure to comply with your states' requirements about who can sell the offering without a broker's or sales license (often only board members and officers can actually sell the offering – but others can talk generally about it and spread the word).