

MORE DEALS. LESS FEES.

CAPTARGET DEAL ORIGINATOR OVERVIEW



OVERVIEW

Based in San Diego, CA

CAPTARGET has been proudly serving the private equity industry since 2011.

We have sourced acquisition opportunities for more than 1000 private equity funds and similar buyers of businesses, all without charging success or finder's fees.

- First movers in 'fee for service' deal origination
- 100% domestic analyst team
- Support committed funds, corporate buyers, family offices, portfolio co's, and other professional business acquirers

SERVICE COVERAGE

ON-MARKET COVERAGE

We track 11,000+ middle-market intermediaries in North America - a task that is daunting for small and large deal teams alike. We run a steady outreach campaign to these professionals, ensuring that you are top of mind and seeing live deal flow.

OFF-MARKET COVERAGE

100% direct-to-business-owner sourced acquisition opportunities. Our team manages the entire process from target list development to outreach and lead qualification without ever charging success fees. A great sourcing solution for new platform investments, add-on acquisitions, or to source new deals and clients for M&A firms.

- **ON-Market Coverage \$3,000 per month**
- **Off-Market Email or Calling Coverage \$3,500 per month**
- **Full-Market Email Coverage \$5,500 per month**
- **Off Market Email & Calling Coverage \$6,500 per month**
- **Full-Market Email & Calling Coverage \$8,000 per month**



SIMPLE PROVEN PROCESS

01



SET UP

Create a new email address at your company domain. We present ourselves as an extension of your team, which helps maximize response rates and ensures all opportunities remain fully owned by you.

02

PROSPECTING



Our team sources well-fitting targets based on your acquisition criteria from intermediaries and/or business owners. With industry leading data accuracy your messaging will reach more quality prospects more often.

03



DATA-DRIVEN RESPONSES

With robust analytics and tracking capabilities, we provide full visibility into campaign performance.

SIMPLE
PROVEN PROCESS

04



QUALITY LEADS + REPORTING

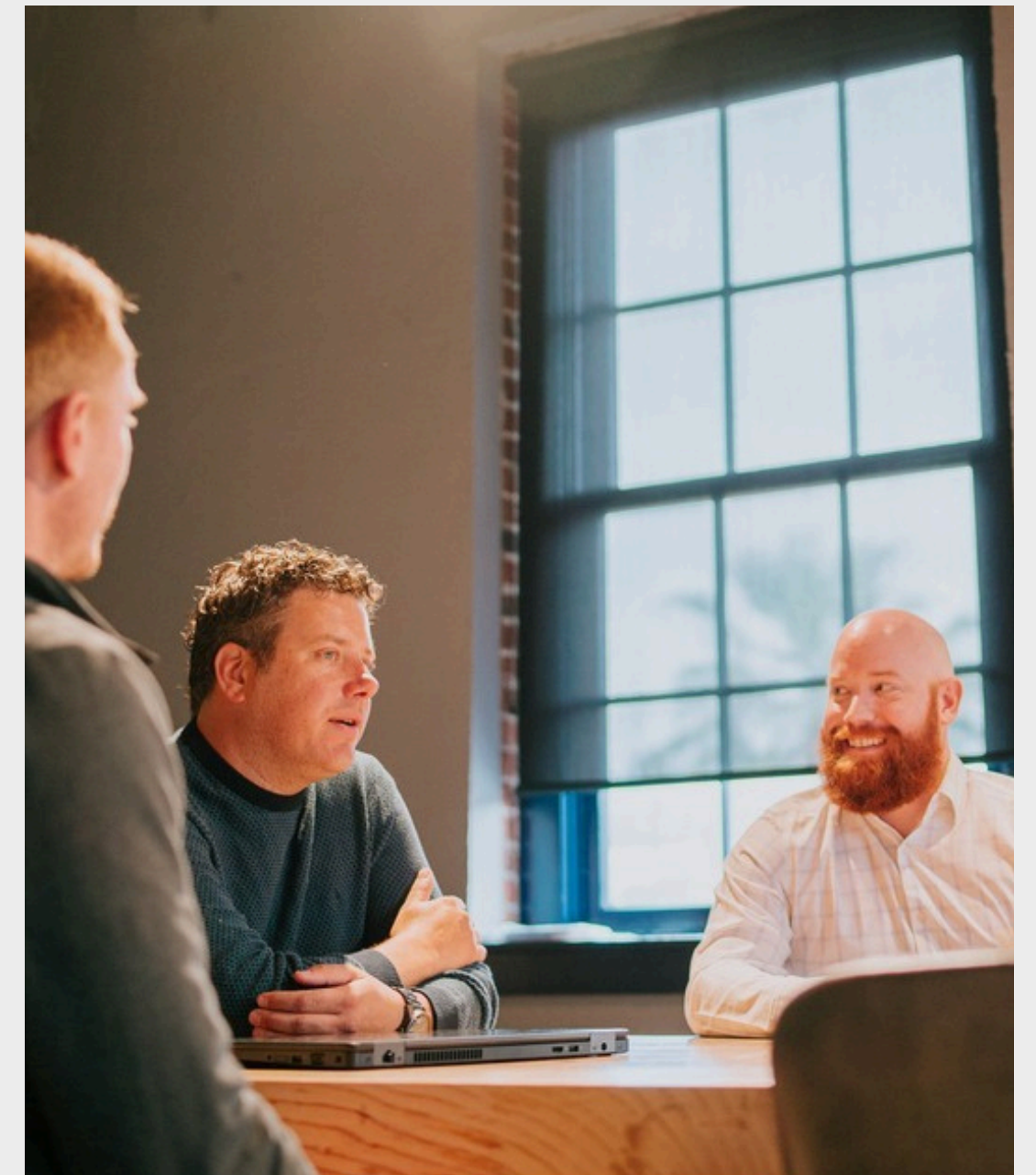
New leads will be delivered directly to your inbox, along with robust analytics to improve future campaigns or trigger targeted follow-up action.

05

RINSE & REPEAT



Each month we start the process over, creating a cascade of lead flow that compounds overtime.



THE CAPTARGET DIFFERENCE



	CLIENT OWNED LEADS	PERSONAL ACCOUNT MANAGEMENT	ANALYST DRIVEN RESEARCH	PROPRIETARY SOURCING OPTIONS
CAPTARGET	✓	✓	✓	✓
Data Providers	✗	✗	✗	✗
Deal Marketplaces	✗	✗	✗	✗
Volume Based Services	✗	✓	✗	✓



DATA PARTNERS INCLUDE



zoominfo



PitchBook



CriticalImpact

dun & bradstreet



Grata



CBINSIGHTS

crunchbase

FACTSET



Wavebox
Powering Productivity



SalesIntel



DiscoverOrg

GlobalSpec



THOMAS
A Xometry Company



RocketReach

YOU ARE IN GOOD COMPANY



The Wilson Companies



Kinsale Capital Partners LLC
A RELATIONSHIP BASED MERCHANT BANK



CAPTARGET | Onboarding FAQ & Best Practices

1. Getting Started

- Contract begins upon payment.
- Kick-off can happen as soon as 24 hours after the proposal is signed.
- Your dedicated Account Manager will reach out to coordinate.

2. Setting Yourself Up for Success

To get the most out of your engagement, we recommend:

- Creating and authenticating your dedicated alias email inbox promptly.
- Making sure your website clearly reflects your strategy and capital structure.
- Using a CRM (or simple tracking system) to organize leads.

3. What to Expect from Outreach

- Off-Market: Campaigns typically take 3–4 months to ramp and produce consistent results. Statistically, the 4th touchpoint delivers the highest return per list.
- On-Market: Intermediary responses can yield results within 1–2 months, but each client campaign is unique.
- Calling (Optional Add-On): Usually begins in the same week as emailing, driving outreach up to 200 companies per month, with up to 13 outbound dials per company. Once ramped, our calling teams average 4–6 booked meetings per month with warm leads surfaced through email.
- Ongoing Support: You'll receive monthly reporting, list refreshes, and strategic adjustments from your Account Manager.

4. How to Avoid Delays

Projects tend to slow down when:

- Research guidance is vague or overly broad.
- Research approvals or feedback are delayed.
- Regular calls aren't prioritized.
- The engagement isn't treated like an internal hire that needs instruction and iteration.

5. Communication & Feedback

- We recommend setting up a recurring Zoom meeting with your Account Manager – weekly, bi-weekly, or monthly depending on your preferences and goals.
- Share feedback regularly so our team can continuously improve list building and outreach.
- Think of us as an extension of your deal team – the more direction you give, the stronger the results.

6. Onboarding Timeline

- Day 1 – Contract signed; Criteria Onboarding Guide sent to collect target details
- Days 2–5 – Kickoff call + alias email setup & domain authentication
- Days 7–15 – First custom list (up to 150 targets) delivered for approval
- Days 10–15 – Email outreach begins (off-market and/or on-market coverage)

STARTING YOUR ORIGINATION CAMPAIGN



SEND 1 PAGER

Send us your one-pager and any specific acquisition search criteria



SIMILAR OUTREACH

If you have any marketing content that has performed well, feel free to share it with us.



SHARE DATA

Share any existing data / target lists that you would like us to contact or avoid



THE 'PERFECT TARGET'

Provide an example (or a few examples) of your perfect target.



COMMUNICATION

Communication is key. It is important to stay in close contact with our Origination Team.



NEW EMAIL CREATION

Be prepared to create a new email inbox that we will use for outreach - FLast@domain or First@domain.



**CONTACT US.
WE'RE HERE TO HELP.**

WWW.CAPTARGET.COM