VirtualAd Capital Raise Marketing Services

Agenda

1

VirtualAd Overview

Overview of our integrated digital marketing approach and team

2

Opportunity Summary

Review of opportunity and objectives

3

Services Walkthrough

Overview of services for issuers

4

Funnel Review

Sharing of various funnel maps

5

Raise Forecasting

Projected capital flow and financial modeling

6

VirtualAd Services Model

Pricing tiers of VirtualAd services

VirtualAd Overview

VirtualAd: End-to-End Capital Raise Marketing

Strategy & Funnel Mapping

Comprehensive investor journey design that optimizes each touchpoint for maximum conversion.

Paid Media

Targeted campaigns across Facebook, LinkedIn, and Google to reach qualified investors with precision.

Creative

Compelling ads, landing pages, and webinar content that communicates your investment opportunity clearly.

Automation & Nurturing

Integrated CRM and DealMaker systems that guide investors smoothly through each stage.

Event Promotion

Strategic event marketing with conversion tracking to measure ROI and effectiveness.

Reporting & Dashboards

Clear visibility into performance metrics and investor behavior to inform strategic decisions.

Everything you need in one partner.

Your **Dedicated** Fundraising Team

Your Fundraising Team

Martin Kocandrle
VirtualAd Partner

Brendan Manley
VirtualAd Partner

Corwin Givens
Head of AI/CRM Systems and Strategy

Teresa Vuong
Client Solutions & Strategy Manager

Daria Hlushenkova
Paid Social Media Buyer

Sebastian Narvaez
Paid Search Media Buyer

Mina Ozbilen
Performance Manager - Data Analytics

Danielle Fobert
Head of Design

Randee Jones
Head of Copywriting

Axel Presali
Wordpress Developer

Prashant Timilsena
Sales Video Editor

We've assembled an elite team of capital raise marketing experts with deep expertise in capital raising

Your Cross-Functional Pod

Strategy Lead

Directs overall campaign strategy, manages client relationship, and ensures alignment with business objectives

Paid Social

Manages Meta and social platform campaigns, audience development, and creative optimization

Paid Search

Oversees Google campaigns, keyword strategy, and search-based targeting approaches

Creative Director

Guides visual identity, content strategy, and ensures consistent brand expression across all touchpoints

Copywriter

Crafts compelling messaging for ads, landing pages, emails, and webinar scripts aligned with conversion goals

Video Editor

Produces high-quality video assets for ads, webinar, and educational content with consistent brand aesthetic

Data/Analytics

Monitors performance metrics, identifies optimization opportunities, and provides actionable insights

AI/CRM Systems

Configures VA Connect, automation workflows, and ensures seamless data flow between platforms

Dev/LP

Builds high-converting landing pages, implements tracking, and manages technical integrations

Primary Point of Contact

Client Solutions & Strategy Manager with extensive experience from TikTok and GroupM/Publicis backgrounds, specializing in high-performance investment marketing campaigns

Opportunity Summary

FrontFundr + VirtualAd

Identified Issuer Marketing Needs

VirtualAd aims to provide scalable marketing solutions that accommodate varying raise sizes and campaign objectives. Our integrated approach ensures maximum visibility and investor engagement throughout the fundraising journey.

Campaign Goal Setting & Project Plan

Strategic planning and milestone definition to ensure campaign success from launch to completion.

Campaign Strategy & Execution

End-to-end campaign management with data-driven strategies tailored to your specific market and audience.

Paid Advertising

Targeted campaigns across Meta, Google, and LinkedIn to maximize reach and qualified investor leads.

1

Content Creation

Professional content development including marketing materials, social media assets, and compelling narratives that resonate with potential investors.

2

Investor Communication & Relations

Ongoing investor engagement strategies, regular updates, and relationship management to build trust and maintain momentum throughout the raise.

3

Webinar Hosting & Execution

Professional webinar production and hosting services to showcase your opportunity directly to interested investors with interactive Q&A sessions.

4

Campaign Video Production

High-quality video content creation including pitch videos, testimonials, and promotional materials that effectively communicate your value proposition.

Today's Focus: Key Marketing Services

We'll delve into a suite of powerful marketing services designed to enhance your campaign's reach and effectiveness, ensuring maximum investor engagement.

Organic Social Media

Crafting engaging content and strategies to grow your organic reach and community across key platforms.

Webinar Strategies

Developing compelling webinar concepts and execution plans to attract and inform potential investors.

AI Investor Relations Suite

Leveraging artificial intelligence tools for personalized investor communication and relationship management.

Campaign Strategy

Designing comprehensive campaign blueprints that align with your fundraising goals and target audience.

Paid Ads Management

Optimizing advertising spend across platforms like Meta, Google, and LinkedIn for targeted outreach.

Marketing Automation

Implementing automated workflows for lead nurturing, email campaigns, and investor onboarding.

VirtualAd Everwebinar Series

Full Webinar Service Summary

Transform your webinar vision into reality VirutalAd handles every aspect of your webinar journey with precision and expertise.

Content Development

- Webinar content outline
- Webinar deck
- Webinar scripting
- Webinar ads
- Webinar landing page
- Webinar registration page
- Webinar confirmation emails, sms
- Webinar attendance reminder emails, sms
- Replay reminder emails, sms
- Attendance thank you emails

Smart Automations

Automation customer journey mapping

Registration / Attendance confirmation

Replay sequence

Thank you sequence

Integrations

Demio and Hubspot webhook integration

Presentation linking to calendar booking

Setup:

Create demio account

Recording Support

- Recording guidelines provided
- Equipment list recommendations
- "Day of" live support for recording

Editing:

- Webinar content editing
- Camera angle matching
- Audio dubbing
- Captions
- Webinar deck integration

Webinar Promotion:

- Paid ads management to drive registrations
- Audience targeting strategy
- Audience exclusions
- Performance management to drive profitable sign ups
- Budget scaling and ramp to attendance date

demio

An Evergreen Webinar Platform

Browser-Based Simplicity

No downloads required for attendees. Join instantly from any device with just a click, removing barriers to participation and maximizing attendance rates.

Automated Registration Flow

Streamlined registration process with automated reminder sequences that keep your audience engaged and ensure maximum show-up rates for your events.

Built-in Analytics Power

Comprehensive tracking of attendance, engagement metrics, and conversion data that provides actionable insights to optimize your webinar performance.

Flexible Webinar Options

- Live interactive sessions with real-time engagement
- Automated evergreen webinars for 24/7 lead generation
- Hybrid events combining live and pre-recorded content
- Seamless scaling from intimate groups to large audiences

Engagement Tools

- Interactive polls and surveys for audience participation
- Live Q&A sessions with moderation capabilities
- Real-time chat for community building
- Downloadable handouts and resources
- Replay hosting with evergreen capabilities

Software Fee Paid By Client

Live or Evergreen? We Do Both

Live Webinar Benefits

Real-Time Interaction

Authentic Q&A sessions and live chat create genuine connections that build trust and credibility with your audience.

Human Connection

Personal presence and spontaneous moments foster deeper relationships that translate into stronger business outcomes.

Urgency & Attendance

Limited-time nature creates scarcity that drives higher registration and show-up rates for maximum impact.

EverWebinar Benefits

Consistent Performance

Reliable metrics across all campaigns with predictable results that enable accurate forecasting and planning.

Scalability

Reach audiences in any timezone without scheduling constraints, maximizing your market reach and accessibility.

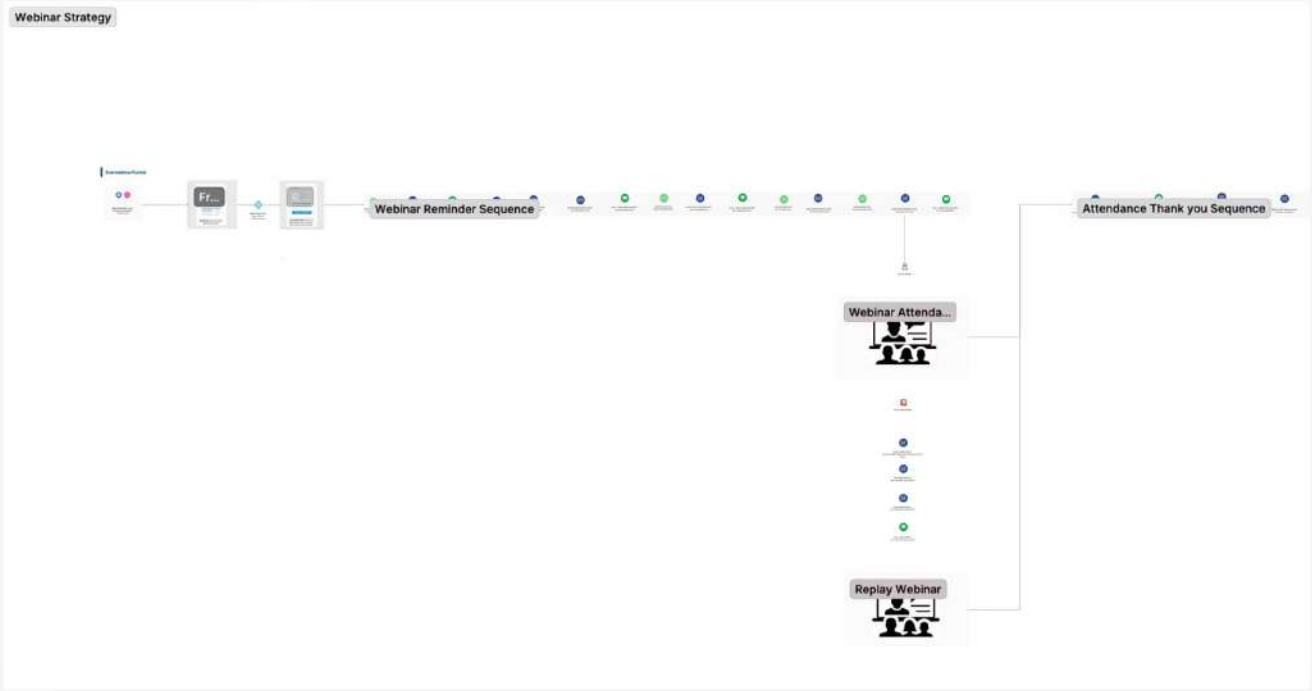
Technical Reliability

Pre-recorded content eliminates live technical issues while allowing continuous funnel optimization for better ROI.

Long-Term Asset

Evergreen lead generation that works 24/7, creating a valuable business asset that compounds returns over time.

Webinar Funnel Format



Webinar Examples

McGillivray Group

ROAS: 6.57

FISYN Group

ROAS: 7.44

Greenfield Robotics

ROAS: 14.4

Webinars have proven to be a successful tool to convert investors

Webinar Pricing

Transform your webinar vision into reality VirutalAd handles every aspect of your webinar journey with precision and expertise.

Content Development

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- Audience exclusions
- Performance management
- Budget scaling to attendance date

$9,899 (one time fee)
$4,950 ongoing monthly management fee
Includes: Email flow monitoring/optimization, ads budget management, multiple channel management,

AI Investor Relations Suite

VirtualAd Investor Relations Suite

Landing Page Chat Bot

Instantly engage visitors on your website with an intelligent chatbot that answers FAQs, collects lead info, and qualifies prospects 24/7.

Conversational AI

Handle inbound calls using voice-powered AI that can understand, respond, and route inquiries - just like a real team member.

Key Benefits

🚀 **Higher Conversion Rates:** Conversational AI engages visitors instantly, guiding them toward actions like booking a call or investing now - reducing bounce rates and increasing lead capture.

🧠 **Lead Qualification:** Can collect and filter information (ie. budget, timeline, investor status), helping you prioritize high-quality leads and send them to the right team.

⚡ **24/7 Instant Response:** Provides real-time answers to questions even outside business hours, keeping the funnel moving and capturing interest while it's hot.

📈 **Reduced Workload for Internal Teams:** They handle repetitive inquiries automatically, freeing up your human team to focus on high-value activities

💸 **Personalized User Experience:** By asking a few smart questions, chatbots can tailor responses and recommend the most relevant content, offer, or next step - boosting engagement.

🔗 **Actionable Insights:** Chat logs provide real-time insights into what your visitors are asking or confused about - valuable data for optimizing your marketing message or offer.

Key Features

Automated Investor FAQ Handling: Conversational AI answers the most common investor questions 24/7 - such as minimum investment, expected returns, platform security, and how crowdfunding works - reducing the burden on your internal team.

Guided Investor Education: It provides a friendly, step-by-step explanation of the offering, how to get started, and what to expect - using plain language to make complex investment terms more approachable.

Seamless Navigation to the Investment Portal: The chatbot naturally guides interested users to the portal when they're ready - ensuring compliance and a frictionless experience.

Trained on Canadian Securities Compliance Standards: Conversational AI is built with compliant language in mind - avoiding prohibited phrases, limiting forward-looking statements, and guiding conversations within regulatory boundaries.

Investor Relations Suite Implementation

Chat Bot AI

Technical Setup
- Embed script or widget installation on landing page or website
- Mobile and desktop responsive configuration
- Integration with lead forms or CRM (ie. VirtualAdConnect, HubSpot, Salesforce)
- Optional UTM tracking and Google Tag Manager setup

Content & Flow Configuration
- Upload and structure investor FAQs
- Tailored conversational flow for Reg D, Reg A, or Reg CF raises
- Approved legal/compliance messaging pre-built into scripts
- Dynamic routing based on user answers (ie. accredited vs. non-accredited)

Lead Capture & Routing
- Instant data capture (name, email, investment interest, location)
- Lead tagging and segmentation
- Optional auto-routing to email, SMS, or sales team notifications
- Export to CSV or sync to CRM

Compliance Safeguards
- SEC-safe response templates
- Forward-looking statement avoidance
- Legal team approval flow before launch

Testing & QA
- Pre-launch sandbox testing with sample investor queries
- Live QA review and failover options for unknown questions

~~$3,299~~ **$2,640 One Time Implementation Fee**

Voice AI

Deployment & Infrastructure
- Hosted within secure portal or embedded in IR site
- API access to document repositories (pitch decks, investor briefs, filings)
- Natural Language Understanding (NLU) engine deployment

Data & Training
- Upload offering memorandum, term sheets, FAQs, regulatory docs
- Label key document sections (e.g., risks, financials, who can invest)
- Train on tone and intent detection (e.g., curiosity vs. concern)

Functionality Configuration
- OM, Reg D, Reg A+, Reg CF response logic
- Multilingual support (optional)
- Integration with Calendar Booking, support ticket systems. investor portals integration DOE. Escalation triggers for flagged queries (legal, negative sentiment, high-investment intent)

Monitoring & Compliance
- Full transcript logs with timestamps
- Audit trail exports for SEC/FINRA compliance
- Regular retraining cycles based on usage

~~$3,299~~ **$2,640 One Time Implementation Fee**

~~$6,598~~ **$5,280 (USD) One Time Implementation Fee**

20% Discount for Full Package

Investor Relations Suite Monthly Pricing

Landing Page Chat Bot

- Branded chatbot interface embedded on your website or landing page
- Pre-scripted conversation flows tailored to specific raise type
- Investor FAQs answered in real time, including minimums, timelines, and process
- Dynamic user routing based on accreditation status or geography
- Instant delivery of documents such as pitch decks or offering summaries
- Automated lead capture including name, email, and investment interest
- Compliant CTA flow directing users to external investment portals
- 24/7 availability with fallback messaging when offline Weekly engagement reports with lead volume and conversation trends

Usage Costs

- $0.1/Message
- Billing Reference $10 will give you about: 100 Message

~~$2,499~~ **$1,633 Monthly Fee + Usage Charges**

Voice Conversational AI

- Conversational AI hosted on your investor portal or IR webpage Trained on your specific offering documents, term sheets, and disclosures
- Handles complex investor questions including eligibility, tax structure, and investment mechanics
- Context-aware conversation logic with tone and intent detection
- Access to key documents provided dynamically within responses
- Compliance-safe language framework to prevent violations
- Built-in escalation logic for sensitive or high-value queries
- Live transcript logging with audit trails for compliance
- Ongoing updates as your raise documents or messaging evolve

Usage Costs

- $0.65/ Minute voice call
- Billing Reference $10 will give you about: 15 Minute voice calls

~~$2,499~~ **$1,633 Monthly Fee + Usage Charges**

~~$4,998~~ **$3,266 (USD) Monthly Fee + Usage Charges**
35% Discount for Full Package

Organic Social Media Support

Service Summary

Strengthen your social media presence with VirtualAdPost™, offering organic content creation, scheduling and posting.

Social Media Support

Building Organic Presence

Content Creation:
Curated content made by our design team in a number of different formats, for multiple platforms

Scheduling:
We use a software that connects with your social assets and schedule posts in advanced, over time this syncs with your audiences most active engagement periods ***$18USD** ***Paid plan needed for Linkedin***

Posting and Content Creation:
Our focus is on the scheduling and creation of content, however it is best that your team manages comments, conversations and interactions

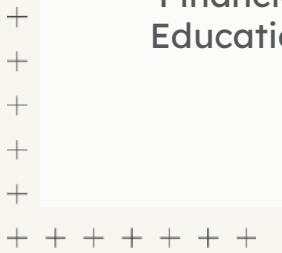
Platforms Posting

LinkedIn

Instagram

Facebook

Content Pillars



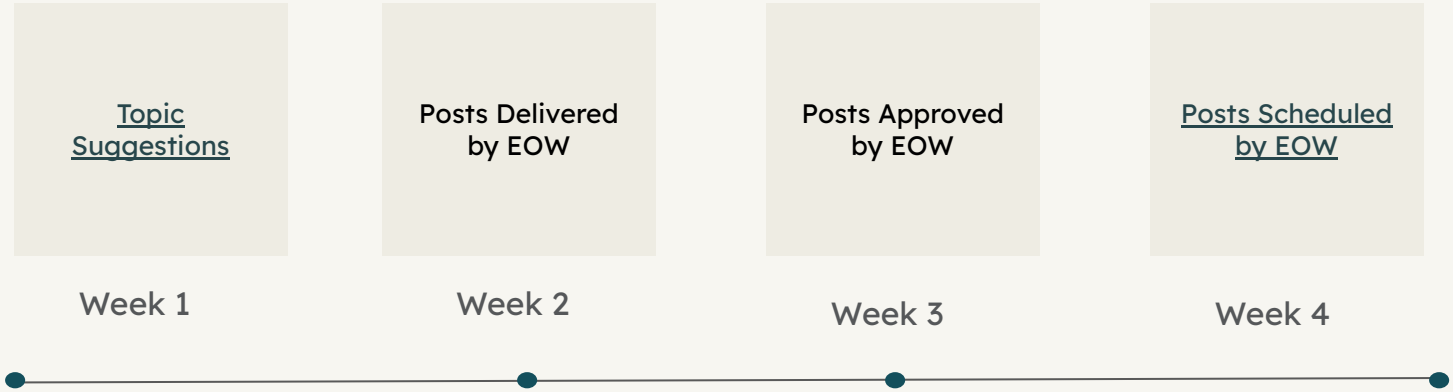
Financial Education

Project Information

Real Estate Investing

Company Information

Content Posting Process



VirtualAdPost™

Strengthen your social media with VirtualAdPost™, offering organic content curation, scheduling, and management.

VirtualAdPost™

Social Content
- 12 static feed posts
- 6 stories, mixed & static

= **18 total posts** each month across each platform (**54 posts total**)

Planning
- Collaborative social calendar
- Pre-scheduling posts at optimal times
- Access to scheduling tools

Social Mockups
- Mock-up document with upcoming month
- Streamlined feedback *via* Figma
- 3x mockup revisions
- Set up once final approval granted

$2,700 monthly

Funnel Management
(Paid Ads + Marketing Automation)

Funnel Management Services

Our comprehensive funnel management service guides your investment campaign from initial discovery through to successful closing, ensuring every stage is optimized for investor engagement and conversion.

Goal Setting

Define clear campaign objectives and key performance indicators for measurable success.

Project Planning

Develop a detailed roadmap for execution with defined milestones and timelines.

Forecasting & Budget

Strategically plan financial allocation and predict campaign performance.

Messaging Strategy

Craft compelling narratives that resonate deeply with your target investor audience.

Ad Design

Create visually impactful and high-converting advertising creatives for all platforms.

Paid Ads Management

Execute and optimize multichannel campaigns across Meta, Google, and LinkedIn.

Marketing Automation

Implement automated workflows for efficient lead nurturing and investor communication.

CRM Management

Maintain and optimize investor relationships through effective customer relationship management.

VirtualAd Secret Sauce

Multichannel Ads Management

Coordinated campaigns across LinkedIn, Facebook, Google, and publiwh34 networks to capture investor attention at multiple touchpoints

Marketing Automation

Sophisticated nurture sequences that educate prospects and move them through the investment consideration journey with minimal manual intervention

Technology Integration

Seamless connection between ad platforms, landing pages, CRM systems and compliance workflows to create efficient investor acquisition infrastructure

Specialised Content Team

Financial copywriters and designers who understand regulatory boundaries and investor psychology to create compelling, compliant materials

Custom Analytics

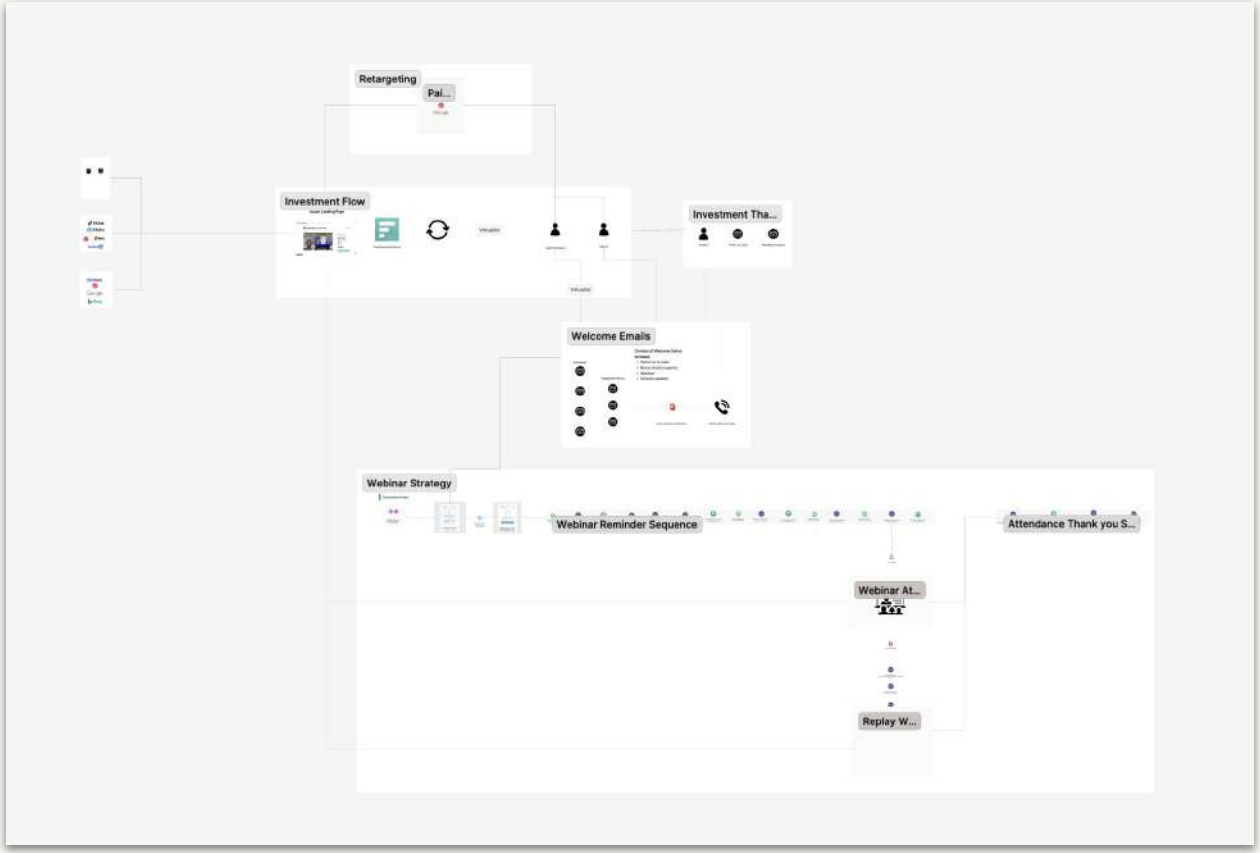
Proprietary reporting systems tracking the entire investor journey from first click to investment, providing actionable insights for continuous optimisation

AI-Enhanced Systems

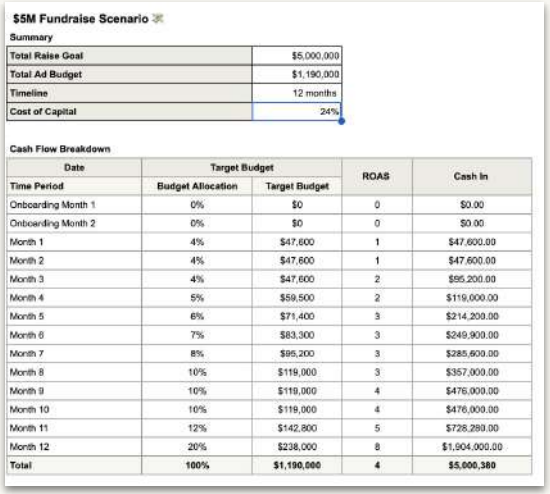
Cutting-edge implementation of AI for investor targeting, creative testing, and lead scoring to maximise efficiency and conversion rates

Comprehensive ecosystem designed specifically for private placement fundraising

Fundraising Funnel Mapping



Fundraising Forecasting and Planning



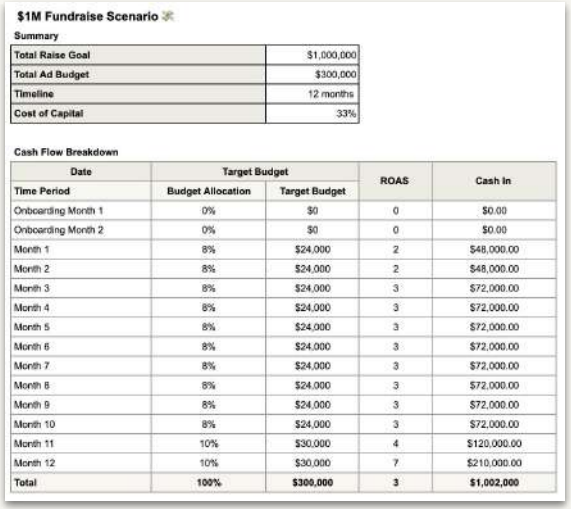
$5M Fundraise Scenario

Summary

Total Raise Goal	$5,000,000
Total Ad Budget	$1,190,000
Timeline	12 months
Cost of Capital	24%

Cash Flow Breakdown

Date	Target Budget		ROAS	Cash In
Time Period	**Budget Allocation**	**Target Budget**		
Onboarding Month 1	0%	$0	0	$0.00
Onboarding Month 2	0%	$0	0	$0.00
Month 1	4%	$47,600	1	$47,600.00
Month 2	4%	$47,600	1	$47,600.00
Month 3	4%	$47,600	2	$95,200.00
Month 4	5%	$59,500	2	$119,000.00
Month 5	6%	$71,400	3	$214,200.00
Month 6	7%	$83,300	3	$249,900.00
Month 7	8%	$95,200	3	$285,600.00
Month 8	10%	$119,000	3	$357,000.00
Month 9	10%	$119,000	4	$476,000.00
Month 10	10%	$119,000	4	$476,000.00
Month 11	12%	$142,800	5	$728,280.00
Month 12	20%	$238,000	8	$1,904,000.00
Total	**100%**	**$1,190,000**	**4**	**$5,000,380**



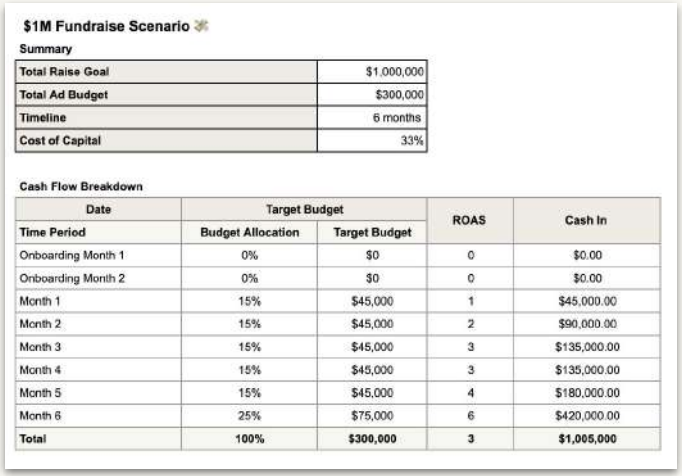
$1M Fundraise Scenario

Summary

Total Raise Goal	$1,000,000
Total Ad Budget	$300,000
Timeline	12 months
Cost of Capital	33%

Cash Flow Breakdown

Date	Target Budget		ROAS	Cash In
Time Period	**Budget Allocation**	**Target Budget**		
Onboarding Month 1	0%	$0	0	$0.00
Onboarding Month 2	0%	$0	0	$0.00
Month 1	8%	$24,000	2	$48,000.00
Month 2	8%	$24,000	2	$48,000.00
Month 3	8%	$24,000	3	$72,000.00
Month 4	8%	$24,000	3	$72,000.00
Month 5	8%	$24,000	3	$72,000.00
Month 6	8%	$24,000	3	$72,000.00
Month 7	8%	$24,000	3	$72,000.00
Month 8	8%	$24,000	3	$72,000.00
Month 9	8%	$24,000	3	$72,000.00
Month 10	8%	$24,000	3	$72,000.00
Month 11	10%	$30,000	4	$120,000.00
Month 12	10%	$30,000	7	$210,000.00
Total	**100%**	**$300,000**	**3**	**$1,002,000**



$1M Fundraise Scenario

Summary

Total Raise Goal	$1,000,000
Total Ad Budget	$300,000
Timeline	6 months
Cost of Capital	33%

Cash Flow Breakdown

Date	Target Budget		ROAS	Cash In
Time Period	**Budget Allocation**	**Target Budget**		
Onboarding Month 1	0%	$0	0	$0.00
Onboarding Month 2	0%	$0	0	$0.00
Month 1	15%	$45,000	1	$45,000.00
Month 2	15%	$45,000	2	$90,000.00
Month 3	15%	$45,000	3	$135,000.00
Month 4	15%	$45,000	3	$135,000.00
Month 5	15%	$45,000	4	$180,000.00
Month 6	25%	$75,000	6	$420,000.00
Total	**100%**	**$300,000**	**3**	**$1,005,000**

Dashboards & Tracking

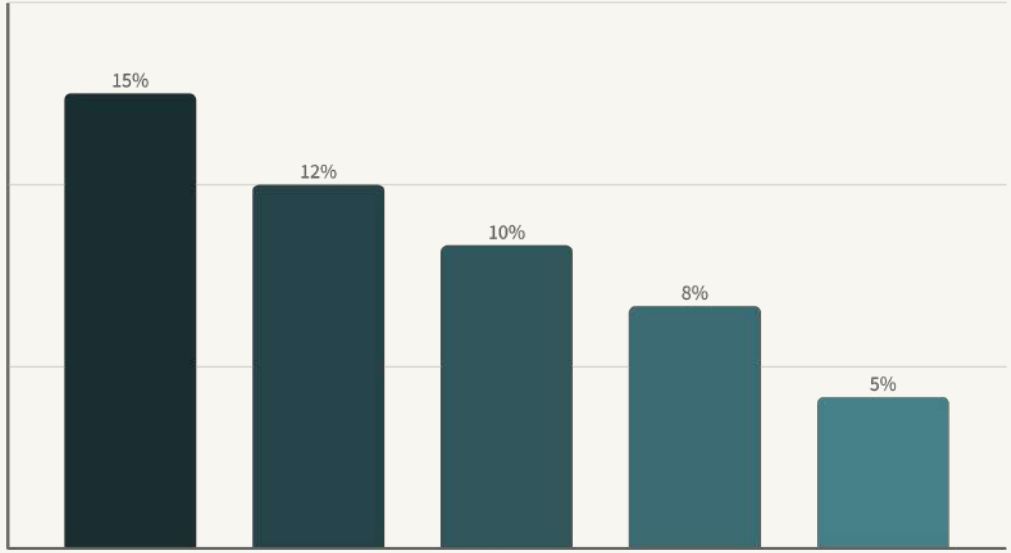
VirtualAd Custom Dashboards

Real-time CAC & CPA tracking - Monitor cost metrics by channel and campaign
Funnel attribution by channel - Identify highest-performing acquisition sources
Investor cohort analysis - Segment by behavior, investment size, and interests
Creative performance insights - A/B testing results and optimization recommendations

Our integrated analytics provide a comprehensive view of the entire investor journey, from initial ad impression through completed investment. This 360° visibility enables continuous optimization and performance improvement across all channels and touchpoints.

Investor Bonus Share Incentives

To reward early participation and encourage swift investment, investors receive bonus shares based on the timing of their contribution:



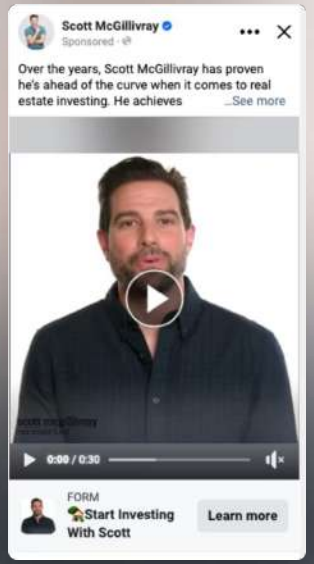
Earlier Investors Earn More Shares!

Strategic Advantages:

- Incentivizes early participation and commitment
- Creates urgency for investors to act promptly
- Rewards long-term loyalty through initial benefits
- Standardized bonus structure for ease of understanding across all offerings

Additional Ideas:

- Product discounts
- User bonus shares (*if applicable*)



Creative That Converts

Our Creative Formula

Stop the Scroll with pattern-interrupting visuals and headlines

Hook → Story → Offer narrative structure that builds investor interest

Contrarian Hooks that challenge conventional investment thinking

Value-First Approach

- Educational content that positions issuer as a thought leader
- Clear storytelling about investor benefits
- Transparent communication of risk/reward profile
- Strong call-to-action that creates urgency without pressure

We focus on educating & adding value through every creative touchpoint

Video Creative Toolkit

Direct-to-Camera Ads

Authoritative investor communications establishing trust and expertise

Explainer Videos

Clear, engaging explanations of the fund structure, benefits and investment process

Thought Leadership

Interview-format discussions demonstrating deep market insights and investment philosophy

Asset Showcase

Visual tours of portfolio properties highlighting quality and operational excellence

Educational Content

Value-first content establishing authority whilst addressing investor questions and concerns

Social Proof

Tasteful testimonials and case studies demonstrating investor satisfaction and outcomes

VirtualAd Marketing Automation: Turning Leads into Lasting Relationships

Our marketing automation services are designed to streamline communication, nurture prospects, and convert leads into long-term investors, ensuring your fundraising efforts are consistently optimized for success.

Why Automation Matters

Email automation ensures always-on communication that nurtures leads at scale, increases conversions, and builds trust. Personalized messaging delivered at the right time leads to higher engagement and reduced drop-offs.

Our Core Services

Strategy & Mapping: Customer personas, user journeys, lifecycle touchpoints.
Design: High-converting, mobile-ready email & SMS.
Engagement Automations: Welcome flows, winback campaigns, re-engagement triggers.

Campaign Sends: Timely launches for product drops, fundraising, seasonal offers.
Integrations: CRM, ad platforms, and analytics synced for seamless management.

Extra Value Adds

Data-Driven Optimization: A/B testing, deliverability checks, performance tracking.
Scalability: Systems designed to grow with your campaigns and investor pipeline.
Full-Funnel Visibility: From lead capture to deal progression, we map and measure every touchpoint.

Timeline to Launch Your Campaign

Our comprehensive 6-week onboarding process ensures a smooth transition from contract to a fully launched and optimized campaign.

1

Foundation & Setup

MSA/SOW Signing & Setup Fees Paid

2

Week 1: Initial Onboarding

Onboarding meeting, account access granted to all platforms.

3

Week 2: Strategy & Creative

Creative alignment workshop, internal strategy development, core messaging defined.

4

Week 3: Content Production

Strategy alignment meeting, key asset production initiated, video content creation.

5

Week 4: Asset Development

Comprehensive asset creation including mockups, email campaigns, ad creative, and landing page drafts.

6

Week 5: Approval & Integration

Client asset approval, DealMaker integrations, CRM and dashboard setup completed.

7

Week 6: Launch & Testing

Final landing page development, tracking setup, full funnel testing, compliance approval, and campaign launch!

This structured approach minimizes delays and maximizes your campaign's potential from day one.

Timeline to Launch Your Campaign

This structured approach minimizes delays and maximizes your campaign's potential from day one.

VirtualAd Services Structure

Rate Structure

Implementation

Ad Channels	Fundraising Funnel Builds
Tracking & Analytics	CRM Configuration
Google Analytics 4	Promotional Planning
Reporting	Publisher Planning

A **fixed, one time amount** at the start of our engagement

Account Management

Account Strategy	Automation Strategy Mapping	Performance Optimization
Dedicated Fundraising Team	Automation Implementation	Campaign Launches
Creative Production	Pipeline & Sales Process	Budget Management
Performance Reporting	Database Management	Issue Monitoring

A **fixed monthly amount** to cover ongoing fundraising efforts and strategies.

Sub $1M Raise - One Time Implementation

A **fixed, one time amount** at the start of our engagement

Ad Channels

Getting Started
- Account Access
- Ad Platform Configuration
- Other Platform Setups (ie. Business Manager)
- Internal Account Audits

Billing Setup
- Billing and Payment Setup

Campaign Setup
- Campaign Planning
- Audience Planning
- Budget Forecasting
- Bid Strategies
- Custom Audience Creation
- Campaign Exclusions
- Ad Uploads and Approvals
- UTM Tracking and Link Testing
- Custom Keyword Strategy (TBD)
- Search Ad Copy + Extensions (TBD)
- Campaign Pre-Launch Review

$995

Tracking & Analytics

Getting Started
- Troubleshoot Existing Set Up

Organization
- Account Organization

Technical Setup
- Pixel Set Up (All Platforms)
- Custom & Standard Events
- Conversion Value Set Up
- Custom Parameters
- Domain Verification
- Aggregated Event Measurement
- Google Tag Manager
- Custom Tags, Triggers, Variables, Templates
- Data Layer Setup
- Google Ads Conversion Tracking (TBD)

Testing
- Pixel Debugging (All Platforms)
- Final Review and Testing

GA4
- Account Setup and Structuring
- Custom Properties, Events and Goal Setup
- Google Ads Integration
- Traffic Source and UTM Parameters

$995

Reporting

Getting Started
- Custom Real Time Dash
- Daily Performance & Scaling Tracker
- Multi-Platform Integration
- CRM Integrations
- VirtualAd Login Credentials

Optimizations
- Custom Formulas

$495

Marketing Automation

Getting Started
- CRM Linking
- Reporting Dashboard Linking
- UTM Link Tracking + Dealmaker Tagging

Optimizations
- Lead Tagging
- List Creation and Segmentation
- Form Trigger Testing

$495

Fundraising Funnel Build

Design
- Ad design
- Welcome series emails
- Ad video editing
- Landing page video editing

Copywriting
- Paid social ads
- Paid search ads
- Video scripting
- Ad scripting
- Welcome series emails

Feedback
- Unlimited Mock-Up Revisions
- Compliance Approvals
- Graphic Design (Multi Device)
- Streamlined Feedback via Figma

$2,995

Promo and Perk Planning

Consultation on Promo Roadmap
- Planning and Suggestions Roadmap
- Promotional Themes & Concepts

Feedback
- Collaboration on Final Promotions
- Creative Messaging Coordination
- Budget Planning [Ramp Ups] for Promotions

$495

$6,470 (one time implementation)

Monthly Marketing Automation Statement of Work

Automation Strategy Mapping

Automation Strategy
- Identify automation opportunity based on customer journey
- Map ideal CRM automations
- Segment users by qualification
- Design multi-touch user journey

Automation Mockups
- Mock-up document with new flow
- Streamlined feedback *via* Figma
- 3x user flow revisions
- Set up once final approval granted

Execution Timeline
- New automations setup timeline
- Deliverable schedule (Monday.com)

Automation Implementation

Automation Set Up
- Set up 3x automations in CRM
- Welcome Series automation
- Engagement based automations
- Investment Completion automation
- Consistent naming conventions

Integration Set Up
- Ad platform and CRM integration
- FrontFundr and CRM integration
- Test ad platform connections
- Troubleshoot connectivity issues
- Execute Zaps *via* Zapier if needed
- Ensure marketing leads enter CRM

Testing & Quality Assurance
- Conduct test lead submissions
- Ensure proper lead integrations

Rules, Triggers, Logic
- Optimize automation timing
- Implement conditional logic
- Create robust user segmentation
- Personalized user journey

Email/SMS Automation

Email Sequence Planning
- Planning sequences and timing for welcome series, needs follow-up and winback automations
- Planning email messaging

Email Mockups
- Long form email design
- Email conversion rate best practices
- Reviewable mockup file for streamlined feedback
- 3x revisions per mockup document

Professional Copywriting
- High converting email copy
- Clear call-to-actions in email copy

Set Up & Testing
- Automations set up in email marketing platform
- Test to ensure deliverability, link accuracy, device compatibility

Tracking
- UTM parameters embedded into all links

Pipeline & Sales Process

Lead Tagging
- Manage leads by marketing source
- Update Tag Naming conventions
- Tag leads by qualified *vs.* unqualified
- Tag leads by meeting booked
- Tag leads by no show
- Add additional tags by request

Database Management
- Manage leads, ensuring proper segmentation *via* tags, segments and lists

Automation Optimizations
- Make improvements on the fly based on automation performance reports
- Improve user segmentation and journey
- Optimize lead scoring for improved filtering for issuer

Troubleshoot Automation
- Ensure automations operate as intended.
- Troubleshoot lead automation queue or automation steps

Sub $1M Raise - Monthly Account Management Statement of Work

A **fixed monthly amount** to cover ongoing fundraising efforts and strategies.

Dedicated Fundraising Team

Service Team
- POD Team Structure
- 1x Account Director
- 1x Account Strategist
- 1x Campaign Manager
- 1x Designer
- 1x Marketing Automation Manager
- 1x Tracking Expert

Communication
- Monthly Meetings

Account Strategy

Strategic Areas
- Budget Planning
- Goal Alignment
- Goal Adjustments
- Performance Forecasts
- Multi-Channel Strategies

Creative Production

Planning
- Ad Briefs
- Competitor Research

Design
- Ad Design (All Platforms)
- Video and Photo Editing
- Copywriting
- Mockup Documents

Optimizations
- A/B Testing
- Ongoing Ad Iterations
- Internal Creative Meetings

Reporting

Real Time
- Custom Real Time Dashboard
- Mobile App Access

Custom
- Monthly PDF Reports
- ROAS and Profitability Calculations

Performance Optimizations

Performance Changes
- Daily Campaign Checks
- Ongoing Optimizations
- Campaign, Ad Set, Ads Optimizations
- Audience Optimizations
- Keyword Optimizations
- Negative Keyword Lists
- Exclusion Lists
- Advanced Bid Adjustments
- Profitability Calculations

Experimentation
- A/B Testing Ads
- A/B Testing Audiences
- A/B Testing Tactics

Performance Strategy

Tactics
- Advanced Bid Strategies
- Manual, Automated, Cost Caps
- Testing Hypothesis
- Testing Takeaways

Process
- 2x Weekly internal POD Meetings
- Internal Performance Log
- Internal Optimization Log

Campaign Launches

Launch Tactics
- Proprietary Campaign Launcher
- Ongoing Campaign Creation
- Ongoing Ad Uploads
- Ongoing Audience Development
- Ongoing Keyword Planning

Budget Management

Process
- Daily Budget Monitoring
- Weekly Budget Pacing
- Weekly Budget Reallocations
- Real Time Budget Pacing Dashboard
- Budget Pacing Meetings

Issue Monitoring

Management
- Campaign Monitoring
- Account Disapprovals
- Meetings with Platform Reps
- Comment Moderation
- Ad Delivery
- Ad Disapproval Troubleshooting
- Routine Platform Support Meetings
- Routine Tracking Tests

$5,000 per month or 10% of Ad Spend above $50K

$1M + One Time Implementation

A **fixed, one time amount** at the start of our engagement

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Reporting

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- VirtualAd Login Credentials

Optimizations
- Custom Formulas

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CRM Configuration

Getting Started
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- Reporting Dashboard Linking
- UTM Link Tracking + Dealmaker Tagging

Optimizations
- Lead Tagging
- List Creation and Segmentation
- Form Trigger Testing

$495

Fundraising Funnel Build

Design
- Ad design
- Welcome series emails
- Ad video editing
- Landing page video editing
- 2x Pages Everwebinar
- 1x Webinar Presentation Deck
- 1x Webinar Post-Editing

Copywriting
- 2x Pages Everwebinar
- 1x Webinar Presentation Deck
- 1x Webinar Script
- 1x Webinar Presentation Deck
- 1x Downloadable 1 Pager
- Ad scripting

Infrastructure Build
- Everwebinar Software Set Up
- API Integration with FF

Development
- 2x Pages Everwebinar

Feedback
- Unlimited Mock-Up Revisions
- Compliance Approvals
- Graphic Design (Multi Device)
- Streamlined Feedback via Figma

Implementation
- Tracking Pixels and Events
- Tracking Implementation Doc

$12,995

Promo and Perk Planning

Consultation on Promo Roadmap
- Planning and Suggestions Roadmap
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Feedback
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$16,470

$1M + Monthly Account Management Statement of Work

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- 1x Campaign Manager
- 1x Designer
- 1x CRM Strategy & Automation Manager
- 1x Tracking Expert
- Leadership Team involvement

Communication
- Email + Video Conference Support
- Monthly Meetings
- Regular Meeting Cadence
- Meeting frequency customized to needs
- Ongoing Strategic Collaboration

Account Strategy

Strategic Areas
- Budget Planning
- New Channels Opportunities
- Support with Publisher Coordination
- Goal Alignment
- Goal Adjustments
- Performance Forecasts
- Multi-Channel Strategies
- Meta, Instagram, Search, PMax, YouTube, LinkedIn

Collaboration
- Strategy Meetings
- Reporting Meetings
- On Demand Meetings
- Presentations

Creative Production

Planning
- Ad Briefs
- Competitor Research
- Personal Development

Design
- Ad Design (All Platforms)
- Video and Photo Editing
- Copywriting
- Mockup Documents

Optimizations
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Reporting

Real Time
- Custom Real Time Dashboard
- Mobile App Access

Custom
- Monthly PDF Reports
- Personalized Email Reports
- Insight Commentary
- Unlimited Reporting Meetings
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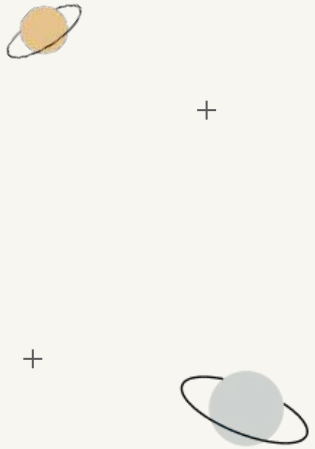
$14,899 per month

Thank You!

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