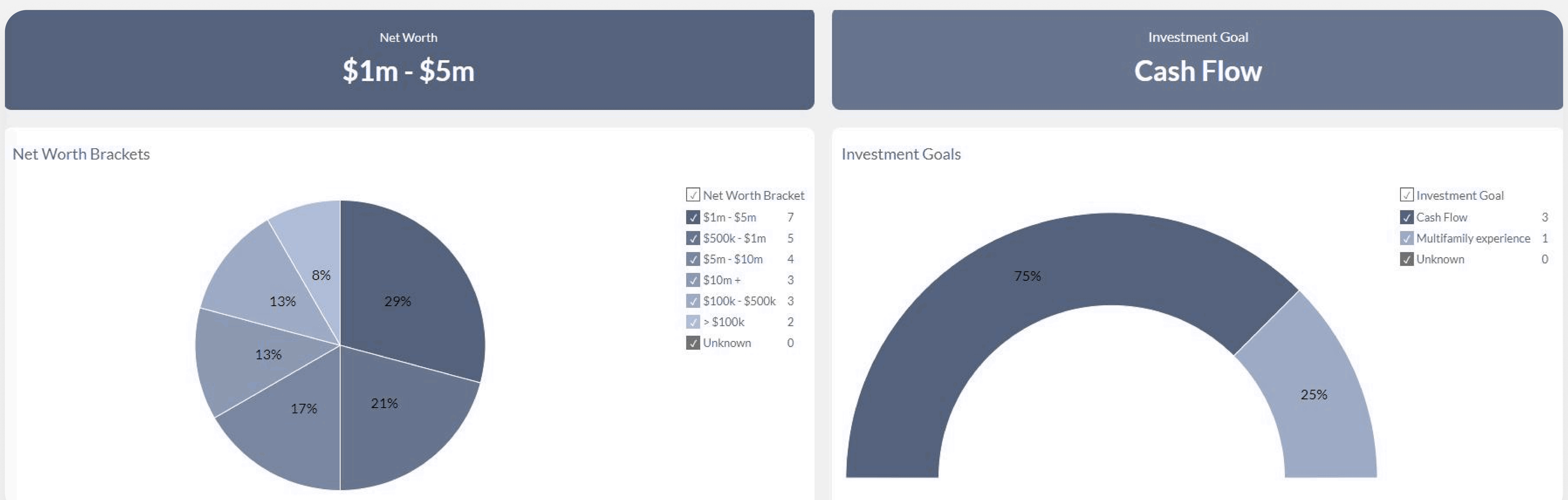
How Capital Raisers Identify & Track Their Perfect Investors

Use your CRM to **attract, understand,** and **secure** your ideal investors—every time.

STEP 1

Define Your Investor Type

- **Institutional Investors:** Pension funds, private equity firms, family offices, etc.
- **Retail Investors:** High-net-worth individuals, accredited investors, small-scale backers.



STEP 2

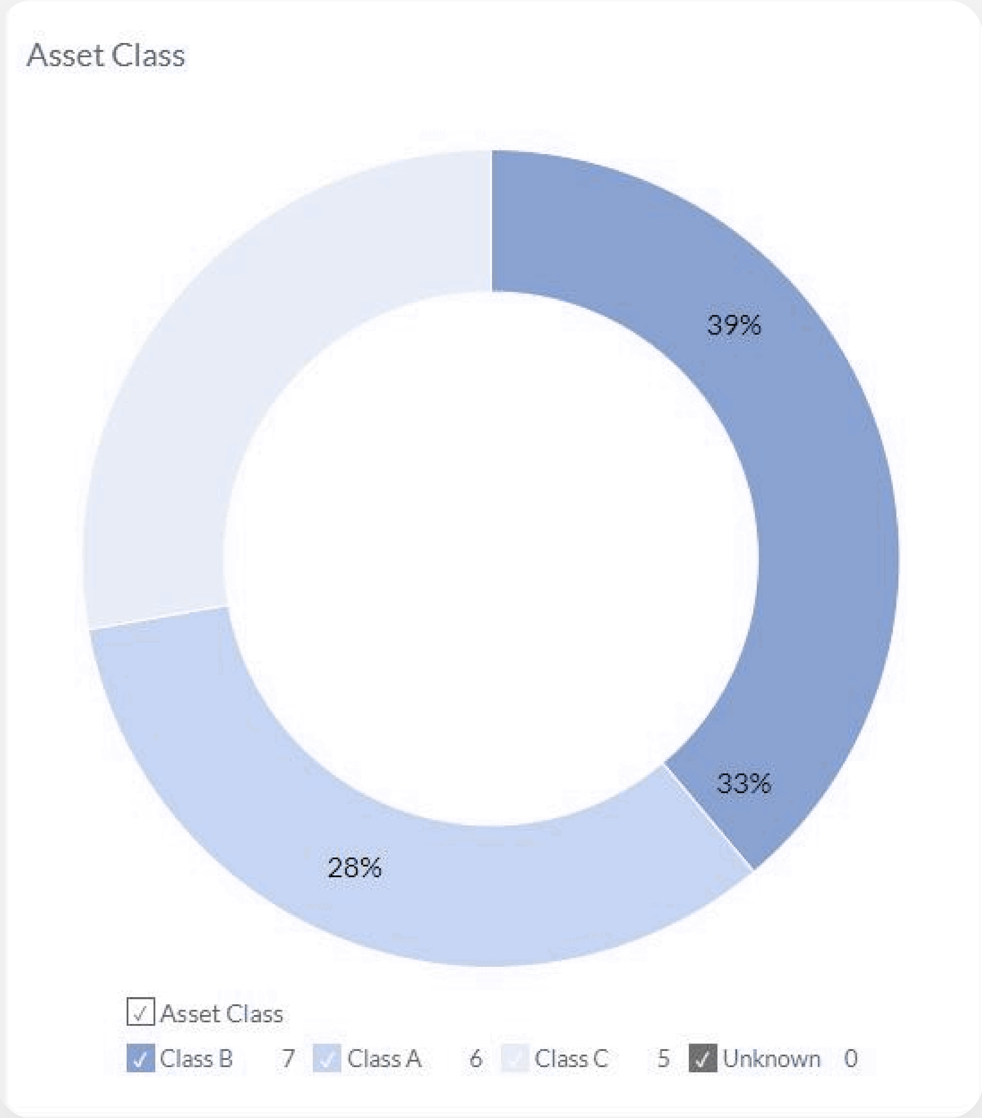
Add Demographic & Behavioral Data Points

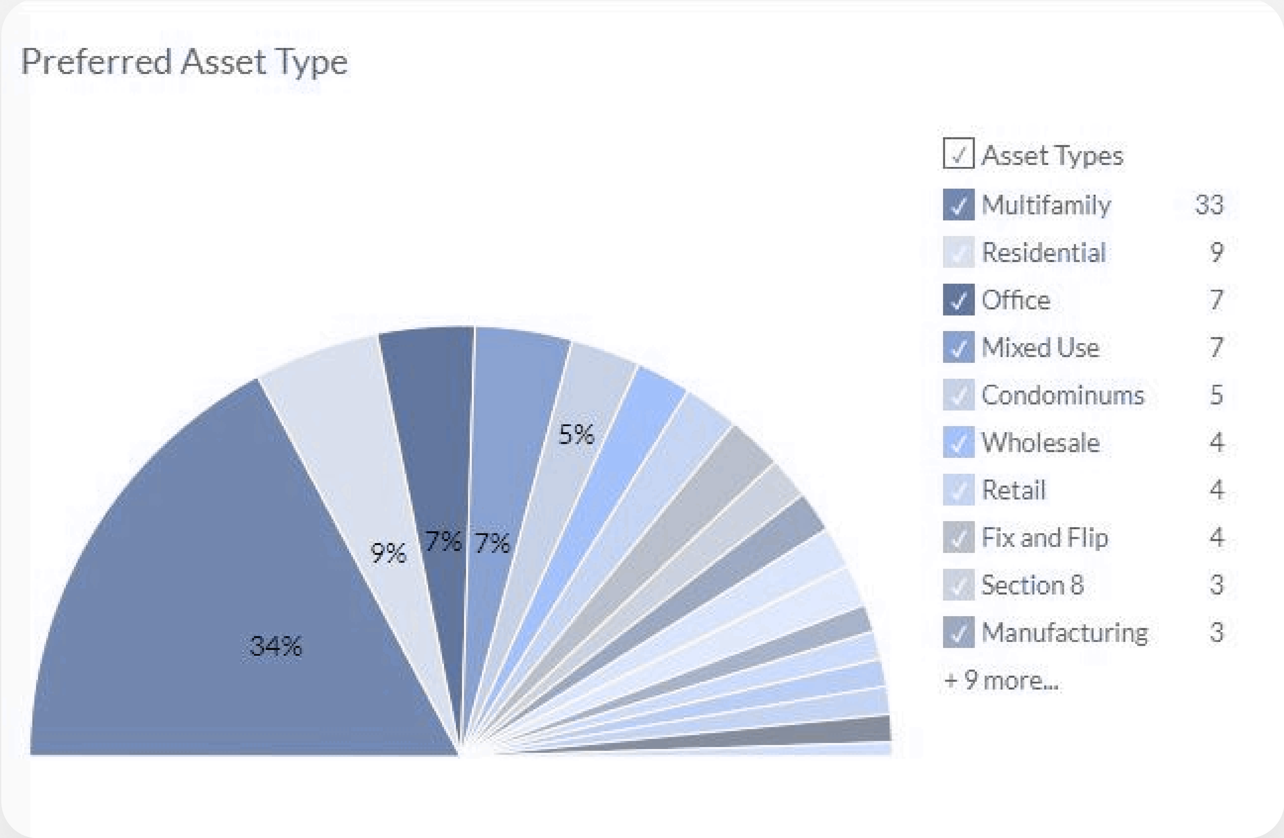
- ✓ **Past Investments** — First-time or experienced? What deals have they backed?
- ✓ **Industry/Background** — Tech, healthcare, finance, real estate, etc.
- ✓ **Age Range** — Influences risk tolerance and communication style.
- ✓ **Location** — City & state affect tax preferences, property interests, and event invites.

STEP 3

Define Buy Box Criteria

- **Investment Range** — Minimum & maximum capital commitments
- **Asset Class** — Class A, B, or C properties
- **Asset Type** — Multifamily, industrial, hospitality, etc.





STEP 4

Track & Visualize in Your CRM

Use custom lead forms in your CRM to capture this data. Then build an IIP Dashboard to visualize trends such as:

- % of Retail vs Institutional Investors
- Average Preferred Investment Amount
- Top 3 Preferred Asset Types

Want to See How Qualifying Data Can Improve Your Conversion Rates?

Schedule a Demo

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