

# Marketing Campaigns & Reports

We do not have much in the way of marketing campaigns. We have automation & landing pages centered around making content available to potential investors (and existing investors).

Most of our sales/marketing interactions are very high touch.

From a broad outreach/audience perspective, we have our [Capitalogix](#) website, our [Capitalogix Funds](#) Website, and our [Investor Portal](#). Howard Getson has a few simple automations we've created to help him invite people to get on a call or a zoom with him, or go to lunch with him. The automations will also send thank you notes after a call.

The only real existing 'campaign' that goes out on any consistent basis would be the 'sign up for our weekly commentary' campaign which is a simple opt-in that triggers a tag in our CRM (Infusionsoft/Keap) and then sends an introductory e-mail with several of our articles as a taster.

We send out a newsletter twice a week. On Fridays we send a link list with a witty image & headline. On Sundays we send our "Weekly Commentary" which contains two articles. Those e-mails go to about 1200 people. They get above average open rates & clickthrough rates. Our clickthrough is lower than it could be on our Sunday e-mails because they're not focused on getting a click. We took a screenshot of our most recent e-mail blasts (which you'll find on the next page). In that timeline, We average over a 52.8% open rate on our e-mails. Historically, we still average over 50% opens.

Email <b>Dark Times ...</b> Sent Nov 1st at 3:06 PM	Sent	54.7% Opens	15.6% Clicks
Email <b>[Capitalogix] Weekly Commentary - ...</b> Sent Oct 27th at 9:27 PM	Sent	54.9% Opens	13% Clicks
Email <b>Better Than The Alternative ...</b> Sent Oct 25th at 4:30 PM	Sent	51.2% Opens	8.7% Clicks
Email <b>[Capitalogix] Weekly Commentary - ...</b> Sent Oct 20th at 8:55 PM	Sent	52.9% Opens	6.3% Clicks
Email <b>Finding New Ways To Fail ...</b> Sent Oct 18th at 11:45 PM	Sent	51.6% Opens	6.3% Clicks
Email <b>[Capitalogix] Weekly Commentary - ...</b> Sent Oct 13th at 11:10 PM	Sent	50.7% Opens	6.5% Clicks
Email <b>Where Old People Go To Die ...</b> Sent Oct 11th at 10:20 PM	Sent	58% Opens	12.5% Clicks
Email <b>[Capitalogix] Weekly Commentary - ...</b> Sent Oct 7th at 11:43 PM	Sent	49.1% Opens	5% Clicks
Email <b>The Joys of Getting Older ...</b> Sent Oct 4th at 10:25 PM	Sent	52.8% Opens	9.5% Clicks
Email <b>[Capitalogix] Weekly Commentary - ...</b> Sent Sep 29th at 9:54 PM	Sent	50.2% Opens	5.2% Clicks
Email <b>Cruel And Unusual Punishment ...</b> Sent Sep 27th at 4:57 PM	Sent	51.2% Opens	5.3% Clicks
Email <b>[Capitalogix] Weekly Commentary - ...</b> Sent Sep 22nd at 7:39 PM	Sent	49.6% Opens	5.4% Clicks
Email <b>The Biggest Threat To Trump ...</b> Sent Sep 20th at 4:19 PM	Sent	51.8% Opens	6.6% Clicks
Email <b>[Capitalogix] Weekly Commentary - ...</b> Sent Sep 16th at 9:23 AM	Sent	46.5% Opens	7.6% Clicks
Email <b>Who Won ... Food For Thought?</b> Sent Sep 13th at 5:17 PM	Sent	57.3% Opens	14.1% Clicks
Email <b>[Capitalogix] Weekly Commentary - ...</b> Sent Sep 8th at 9:19 PM	Sent	51.6% Opens	6.7% Clicks
Email <b>Let Me Consult My Psychic ...</b> Sent Sep 6th at 11:23 PM	Sent	55.6% Opens	9.7% Clicks
Email <b>[Capitalogix] Weekly Commentary - ...</b> Sent Sep 2nd at 12:41 AM	Sent	55.2% Opens	14.8% Clicks
Email <b>Is It That Time Of Year already?!</b> Sent Aug 30th at 11:09 PM	Sent	60.7% Opens	15.3% Clicks

## Investor Outreach Campaign

The only other 'Campaign' would be automation that we've configured in Infusionsoft to help us understand where potential investors are in their sales journey, and to help facilitate communication.

I'll share images of the automation below, but it's at the highest level of granularity. To show what happens in each step would be almost impossible to do in a reasonable manner.

Ultimately, here are the high-level chunks of automation. You'll find two corresponding images on the following page. Green rectangles are 'live'. Grey rectangles are pieces of automation that we decided not to use.

We have our Pipedrive Automation which connects to another one of our CRM softwares, Pipedrive. What it does is allow us to either move someone up or down the sales funnel from Pipedrive or Infusionsoft, while ensuring connection between the two. It also triggers updates to Howard's assistant at key points, sends links to potential investors, and helps them set up a call if they've been in a level of the sales funnel for too long.

Our Fund & IC (Inner Circle) Automation helps us nurture people while they're in the middle of sales funnel steps, and send them documents that might not be needed in the normal process.

