

THREE EXAMPLES OF COLD-CONTACT EMAILS THAT WORKED, AND FOUR SUBJECT LINES

Subject: Your CFA talk last September...

Dear Eleanor,

Your talk at the CFA Society in September resonated strongly; I appreciated your take on the current opportunity in Latin America, as I adopted this same strategy in managing a portfolio for InvestCo5. On another note, I notice that we share two connections and three groups on LinkedIn.

As a portfolio manager and CFA Charterholder, I'm beginning to look for other opportunities. Given your reputation in the industry, I would very much appreciate 15-20 minutes of your time to gain your insight on how I might be of help to InvestCo1 down the road. I will not be expecting any openings at InvestCo1; this request is purely informational.

Our conversation could be mutually beneficial. My success with the strategy you outlined might be of interest to you. As well, I have a broad and deep network on LinkedIn (I know all of my roughly 800 contacts) and would be happy to make introductions.

Some background: I have over 15 years of experience achieving returns that have consistently outperformed the benchmark (*InvestCo5*, *InvestCo6*). My expertise includes fixed income, equities, options, convertible arbitrage, and cross-asset class trading. Highlights:

- Managed portfolios of over \$1 billion, achieving returns that were **twice the peer average** through 2008-2010.
- Took underperforming portfolios at FinCo1 and FinCo2 and turned them into **successful profit generators**.
- Took positions that netted **returns of over 140%** in six months, through research on distressed investments.
- **Created four asset allocation products** including a \$640 million dollar target date fund series and a \$1.6 billion risk-based series.
- Considered a **subject-matter expert**; presented at last year's X conference; regularly asked to present to prospects, clients, boards, and investment committees.

My LinkedIn Profile is www.linkedin.com/in/x if you would like to find out more about me.

I would value and appreciate your perspective on my situation and believe even a brief meeting could be beneficial. Would you have a few minutes available to talk, perhaps sometime next week?

Elements of Success

- Focus on value to them
- Asked for just 20 minutes
- Mutually beneficial
- Powerful Pitch
- Not asking for a job
- No reference to a resume
- Call to action
- Show appreciation

Subject: Discuss physician leadership at Healthorg?

Dear Naomi,

I appreciate Healthorg's unique commitment to developing its physician's leadership skills. As a physician-executive, I bring many years of experience successfully managing and developing physician leaders. Perhaps a conversation could be mutually beneficial.

With senior leadership roles including VP for Medical Affairs and National Medical director, I know how to identify and develop potential leaders. I bring a track record of improving both leadership success and retention of talented physicians.

I've developed physicians' leadership abilities at health systems such as Wellknown Medical Center and Wellknown Healthcare, community hospitals such as The Wellknown Hospital Center and Wellknown Hospital in Rye, NY, and national managed care organizations such as TopHealthInsuranceCompany. Highlights:

- Created annual **development plans** that enabled up to 17 national health plan medical directors to achieve their personal goals and assume additional leadership responsibilities.
- **Trained physician-reviewers** without prior leadership experience to serve as Regional Medical Directors for populations of more than 100,000 members, and implement enterprise-wide initiatives that helped save more than \$70 million.
- Through **mentoring**, enabled physicians to chair a new 1000-physician, risk-bearing independent provider association that engaged providers, leading to Medicare highlighting it as one of the most successful accountable care organizations in the country.
- **Developed vascular surgeons** without prior administrative experience to successfully launch and lead a minimally invasive procedure service-line at a large community hospital.
- **Coached local health plan CMOs**, enabling them to obtain support for new initiatives and reduce new medical director on-boarding time.
- **Mentored medical students** at Wellknown College of Medicine interested in a career in administration.

My LinkedIn profile is X for your additional information.

Your Institute is, to me, a model for how to develop and retain talented physicians. Given my success with leadership development, your commitment to the same, and my interest in seeing how I can help Healthorg achieve its leadership and retention goals, I believe even a brief meeting could be mutually beneficial.

Would you have 20 minutes available on your calendar to talk? I will contact your office in a few days to see if I can get on your calendar, assuming I don't hear from you first.

Subject: Open to discussing Development/Fundraising at Ivy University?

Dear John,

Upon reading your bio on the Ivy website, I thought I would reach out to you, as I myself have experience that could support fundraising and development efforts.

I currently work in New York City (at WellKnownCo and teaching part-time at WellKnownSchool), and in the long run am looking to work in the Hudson Valley, preferably at Ivy or one of the other area Universities. I would greatly appreciate 20 minutes of your time to gain your insight on how my experience might be a fit in a University setting (I will not be expecting any openings). Given my many years of experience with Data Mining and DataMart design, perhaps I could also share with you some knowledge that you would find useful for Ivy's fundraising efforts.

Some background: I have nearly 14 years in Database Marketing analytics, that is, turning raw data into actionable knowledge for Marketing or Sales teams. I believe that a University would find this experience valuable in helping to optimize fundraising contacts, target enrollment prospects efficiently, and improve retention. Highlights include:

- **Doubled Marketing's ROI to 23%** by adopting a "test-learn-enhance" approach to campaigns, and by developing segmentation/modeling strategies.
- **Increased retention by 57%** for high potential customers, and increased new account acquisition revenue by 79%, by developing segment-based targeting strategies.
- Led creation of entire **analytics infrastructure**, including development of databases with millions of records.
- **Modeled customer behavior**, creating segments that led to campaigns which generated \$ millions in revenue.

My LinkedIn profile is X.

I also notice from your bio that you made the transition from corporate to university that I'm looking to make. I would greatly value your insight regarding this transition I'm seeking. Would you be available for a brief meeting?

ALTERNATE INTRO TO SAME EMAIL:

Subject: Chronical of Higher Education- Your name surfaced in an article

Dear Susan,

Upon seeing your name in a *Chronicle of Higher Education* article about using Data Mining for fundraising, I thought I would reach out to you, as I myself have many years of experience optimizing contacts through Data Mining.

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