

Investor Inbound Do's and Don'ts

It's tempting to take calls with investors who reach out to you cold year round, but doing so can set you up for failure.

This guide is designed to help founders understand when to take the call, when not to, and how to handle pre-fundraise and mid-round investor interest.



Do This

- Research investors who inbound to understand if they're a thesis fit and actively investing.
- Take calls from High or Very High fit investors.
- Set aside a few days a month for investor calls when you're not actively raising.
- Reserve warm introductions until you're actively raising.
- Tease an upcoming round
- Let them know you like to get to know investors well ahead of a fundraise to build the relationship
- If they ask, let them know that you don't have a deck or materials since you're not raising.



Not That

- Engage with unmapped investors without knowing if they're a good fit.
- Engage with low-fit investors.
- Let calls disrupt your schedule and hold ad hoc investor calls at all times of the year.
- Use introductions prematurely, as they can be a more impactful card to play at the right time.
- Say you're actively raising
- Imply that you're actively fundraising if that's not the case.
- Send them an old deck or half-baked materials when you're not in-market.



Summary of Best Practices

01

Research Thoroughly:

Use Flowlie or another investor database to check their thesis & investments

02

Engage selectively:

Take calls from high-fit investors and key contacts.

03

Reserve intros:

Save warm introductions for active fundraising periods.

04

Calendar density:

Designate a few days per month or quarter for investor calls.

05

Communicate clearly:

Be honest about the current focus on operations and future fundraising intentions.

06

Limit information sharing:

Make clear that you don't have a deck ready since not fundraising.

You don't want to be "tracked" by the firm and give up too many details

[Find, qualify & manage your perfect investors in Flowlie - try our 7-day free trial today](#)

