

CROWDFUNDING SUCCESS CHECKLIST

This checklist is designed to help you plan your campaign activities in advance and to increase the likelihood of your success. You should anticipate employing the actions and strategies identified below throughout your entire campaign, but **your primary goal should be generating early investment momentum and word-of-mouth buzz.**



ENSURE YOUR MESSAGE IS CLEAR WITH GREAT CONTENT

Develop multiple ways to reinforce your brand and message. Create videos to engage your audience and be concise in your value proposition. Consider a professional video producer since videos can easily be shared and are a highly leverageable and engaging way to tell your story. Seek feedback from people you trust on whether your content is compelling. Remember, people have short attention spans so grab them right away and try to keep the video short and sweet!



LINE-UP AND LEVERAGE YOUR PERSONAL NETWORK

Ask your friends and family to be the first to support your campaign. Be specific and clear in your request so that they understand the importance of generating the initial campaign momentum. Let them know you are relying on them and ask them to help you spread the word. Consider who in your network could be a major backer and plan on calling them directly or setting up a one-on-one personal meeting.



ENGAGE YOUR CUSTOMERS, COMMUNITY, FANS AND FOLLOWERS

Aggregate user information including current users, supporters and people who have expressed interest in your product/service. Collect information such as email addresses, social media handles, phone numbers, and other contact information in a single place and then think about how to break up the list into manageable groups for custom messaging. Make your followers feel valued and provide them with updates during the process to make them feel involved. Create a sense of urgency around supporting your company and be ready with personalized follow-up messages. NOTE: always be sure to send potential investors to your campaign page – see appendix.



LEVERAGE YOUR SOCIAL MEDIA CHANNELS

Broadcast notice of your campaign through the social channels you currently engage in; Facebook, Twitter, Instagram and/or Pinterest. Identify relevant hashtags to raise awareness and always include a campaign link in your posts. Ask people for feedback to engage them. NOTE: advertising rules apply and you should refer all questions to the communication channel of your campaign (refer to the advertising guide link included in the appendix).



ENCOURAGE YOUR BACKERS TO PROMOTE YOUR CAMPAIGN

Deploy thank you messaging targeted to anyone that commits to participate in your campaign. Keep them informed by providing updates on your company (without becoming a spammer). Make it easy for your backers to celebrate their involvement and to publicize their investment (possibly by providing them with content to repost on social media or in emails to their colleagues). Remember that collaboration can generate excitement and support. NOTE: advertising rules apply and you should refer to our advertising guide to assist you with compliance – see the appendix.



BE RESPONSIVE TO INQUIRIES AND QUESTIONS

Guide all investor questions to the communication channel on your campaign – it is important that you NOT have one-on-one Q&A sessions with certain investors without making sure that all investors have access to the same information. Have a system in place for responding to a potential spike in email traffic and for ensuring that you have the capacity to respond quickly to investor questions on the communication channel. Update your FAQ section to anticipate questions and to address areas of investor inquiry where there may be some confusion that could easily be resolved.



IDENTIFY PRINT AND DIGITAL NEWS SITES TO TARGET

Prioritize news targets that would have the most interest in your story and are most likely to mention your campaign. Research, follow and contact the bloggers that are likely to have a readership that could get excited about your product/service. Reach out to local media outlets.



BUILD AWARENESS WITH A COMPREHENSIVE PRESS RELEASE STRATEGY

Develop press release messaging in advance that can be tied to specific campaign milestones. Consider unique messaging for specific audiences. Identify ways that your crowdfunding campaign can be mentioned alongside other operational successes. Expect to front-load your press releases as part of a communications plan that includes messaging that you can communicate throughout your campaign. Identify your team members who will be available for interviews and “keep them on script.”



✓ CONNECT, ATTRACT AND ENLIST AFFINITY GROUPS AND ALIGNED PERSONALITIES

Identify those people or groups that are “influencers” within your market or who aggregate the people who are likely to want to become ambassadors for your product/service. Reach out to the “thought leaders” in your area to see if they would be willing to share your campaign through their social media or to mention your campaign at one of their meet-ups or events. Find local businesses or related companies that would benefit from your success and may want to help you publicize your campaign. Find a champion/evangelist who can speak passionately about your story and investment opportunity.



✓ CREATE WAYS TO GET IN FRONT OF POTENTIAL INVESTORS

Brainstorm strategies to increase awareness of your campaign. Consider having a launch party or whether certain conferences, meet-ups or events would help you connect with investors or valuable members of the press. Think about where your ideal investor might be and identify opportunities and communication strategies to connect with them. Evaluate whether you have any customers, suppliers, partners or sponsors that would be interested in investing or connecting you with investors.



✓ EMPOWER YOUR TEAM AND IDENTIFY TRUSTED ADVISORS

Get your team involved in the brainstorming and consider creating an internal committee or external group of advisors to assist you with your marketing and media plan. Make sure you have trusted collaborators to use as a sounding board. Give someone responsibility for collecting and incorporating feedback from advisors and investors. Identify a person who can help keep you on target with your scheduled marketing messages and communication goals.



✓ SUPPORT YOUR MARKETING EFFORT WITH OUTSIDE PARTNERSHIPS

While not necessary, hiring an external agency can have a tremendous impact on the likelihood of your success. An agency can contribute to your marketing outreach to free you up to manage other aspects of your campaign. An agency can help synthesize your messaging and expand your reach potential.



✓ FOLLOW THE RULES

Review our advertising guidelines and know the advertising constraints imposed by the crowdfunding rules. Be sure to abide by the limitations on what you can share and always refer investors to your campaign listing on the [GrowthFountain.com](https://www.growthfountain.com) website, particularly with respect to questions. You can refer to the appendix of this document for samples and to our online guide for suggested best practices at [GrowthFountain.com/pg/advertising](https://www.growthfountain.com/pg/advertising)



APPENDIX

The following types of advertisements and marketing messages are likely to comply with the requirements of the crowdfunding rules¹ because each one (a) directs investors to the crowdfunding platform and (b) is limited in the information provided. As specified in the rules, a company is not allowed to share anything more than a limited amount of factual information such as (1) the amount of securities offered, the nature of the securities, the price of the securities and the anticipated closing date of the offering period and (2) the name of the issuer of the security, the address, phone number and Web site of the issuer, the email address of a representative of the issuer and a brief description of the business of the issuer.

Words that imply growth, success or progress (whether referring to the company or the offering) are likely to be problematic particularly if they suggest any forecast or forward-looking statement that could be interpreted as a promise or guarantee that something will occur.

POTENTIAL TWEETS:

"Like our product? Own the company! Our crowdfunding campaign is live on [Growthfountain.com/YOUR_LINK](#)!"

"Like it? Love it? Own it. [Growthfountain.com/YOUR_LINK](#)"

"We need your help! Our crowdfunding campaign is live on [Growthfountain.com/YOUR_LINK](#)!"

"We are offering up to \$XXX,000 of common stock under §4(a)(6) of the Securities Act. Go to [Growthfountain.com/YOUR_LINK](#) to learn more."

POTENTIAL FACEBOOK POSTS:

"We are crowdfunding! Act now to become an investor! Access the terms of our offering at [Growthfountain.com/YOUR_LINK](#) to learn more. This offering is being conducted pursuant to §4(a)(6) of the Securities Act and is expected to close on Date, 2017."

"Our Company is offering to sell up to \$XXX,000 of our common stock under §4(a)(6) of the Securities Act. Go to [Growthfountain.com/YOUR_LINK](#) to learn more and invest."

POTENTIAL E-MAIL SIGNATURE:

Best Regards,

Your Name

We are crowdfunding! Learn more and invest at [Growthfountain.com/YOUR_LINK](#)

POTENTIAL EMAILS TO PERSONAL NETWORK:

"We urgently need your help in building momentum for our crowdfunding campaign. Please take a minute to go to [Growthfountain.com/YOUR_LINK](#) to become an investor. This offering is being conducted pursuant to §4(a)(6) of the Securities Act and we are trying to raise up to \$XXX,000. Your becoming one of our first investors would be a great way to show your support."

"I am writing to ask you to participate in our crowdfunding campaign with an investment of \$X,000. Our Company is in the process of offering up to \$XXX,000 of our common stock under §4(a)(6) of the Securities Act and we want to generate some initial momentum by having our closest friends invest. I ask that you please check out [Growthfountain.com/YOUR_LINK](#) to learn more and to show your support."

POTENTIAL EMAIL TO BACKERS:

"We greatly appreciate your participation in our campaign and your recognizing the potential of what we are building. We look forward to sending you updates on our fundraising progress and hope that you can help us by sharing the news of your investment with some of your friends and colleagues. It can be as simple as posting on Facebook or tweeting "Join me in supporting this campaign: [Growthfountain.com/YOUR_LINK](#)". Thank you again for your investment and support."

¹REGULATION CROWDFUNDING §227.204 Advertising states specifically that:

"(a) An issuer may not, directly or indirectly, advertise the terms of an offering ... except for notices that meet the requirements of paragraph (b) of this section. [NOTE: issuer includes persons acting on behalf of the issuer].

(b) A notice may advertise any of the terms of an issuer's ... if it directs investors to the intermediary's platform and includes no more than the following information:

(1) A statement that the issuer is conducting an offering pursuant to section 4(a)(6) of the Securities Act, the name of the intermediary through which the offering is being conducted and a link directing the potential investor to the intermediary's platform;

(2) The terms of the offering; and

(3) Factual information about the legal identity and business location of the issuer, limited to the name of the issuer of the security, the address, phone number and Web site of the issuer, the email address of a representative of the issuer and a brief description of the business of the issuer."