



LP BLUEPRINT

**COLD EMAILS THAT
ACTUALLY GET LP MEETINGS**

Join Capital OS Premium – June Cohort



Capital OS Premium

A high-trust cohort with the tools, structure, and clarity GPs need to stop winging it and start closing.

UNLOCK QUARTERLY

UNLOCK ANNUAL

Whats Included

- Full Narrative Overhaul – From first word to closing call
- Deck + Data Room Refinement – Clarity, structure, and strategic polish
- LP Pipeline Design – Tiered, prioritized, frictionless
- Fundraising OS Buildout – From pipeline dashboards to workflows
- Live Cohort – Weekly sessions and async reviews
- Capital OS Access – All AI tools + lifetime updates

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Why Most LP Outreach Stinks



**You Sound Like
Everybody Else**



**Does Not Focus On LP's
Pain in 2025**



**You Send Too Little,
Too Late**



**Zero Insight, All Pitch,
Not About The LP,
About Your Ego**

Average GP/SVP of IR Email Metrics (and why they totally stink)



1-2% reply rate
(this costs \$2M on a \$100M fund)



High spam scores



Long sequences, no CTA heat

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What Winning Emails Have In Common

One Insight

Remember, your subject line should be about 5-8 words, 30-50 characters. Content should be 75-125 words, 3-6 sentences max.

One Offer

Stick to things that focus on urgent 2025 inst LP pain.

1. Want to see how LPs are triaging overallocated portfolios right now?
2. Want to see how we pre-wire risk scenarios into our LP updates?
3. Want a 1-pager you can show to your IC to evaluate us against AI/infra/real asset exposure targets?

Human Tone

If you copy-paste some Chat-GPT sh*t good f**king luck with that

Anchor Emails Explained



What's An Anchor Email?
(or 49?!)



When To Use It
(Early vs Late Funnel)



How To Write It

Smartlead & Hubspot In Tandem



Smartlead

For Volume



Hubspot

For Tracking, Timing & Sequencing, Works
Better For ABM and Content Management

(\$317-\$477k/year) Cost Breakdown for Raising \$100M–\$200M from Institutional LPs Using HubSpot + Smartlead

Category	Item	Annual Cost (Low)	Annual Cost (High)
Software Stack	HubSpot (Sales Hub Enterprise)	\$14,000	\$20,000
Software Stack	Smartlead.ai (5 inboxes + warm-up)	\$3,000	\$7,000
Staffing	VP/Director of Capital Formation	\$180,000	\$250,000
Staffing	Analyst / Associate	\$70,000	\$120,000
Staffing	Admin / CRM Ops Specialist	\$50,000	\$80,000

*Cost Breakdown for Raising \$100M–\$200M from Institutional LPs Using HubSpot + Smartlead

Capital Formation Budget for \$100M–\$200M Institutional Raise

DIY (\$480k–\$1M), w/Placement Agent (\$1.5–4M) – Cost of Raise – 1-2%, always

Category	Item	Low Estimate	High Estimate
Staffing	VP of Capital Formation	\$180,000	\$250,000
Staffing	Analyst / Associate	\$70,000	\$120,000
Staffing	Admin / CRM Support	\$50,000	\$80,000
Software	HubSpot CRM	\$14,000	\$20,000
Software	Smartlead Outreach	\$3,000	\$7,000
Software	Other Tools (e.g. ZoomInfo, Zanier)	\$8,000	\$15,000
Marketing	Decks, 1-Pagers, Branding	\$15,000	\$35,000
Marketing	Data Room + Fund Website	\$10,000	\$25,000
Marketing	Explainer Video (Optional)	\$5,000	\$15,000
Events	LP Dinners / Roundtables	\$50,000	\$250,000
Events	Conferences + Travel	\$25,000	\$150,000
Legal	Marketing Compliance + Review	\$50,000	\$100,000
Placement Fees	Optional Placement Agent (1–2.5%)	\$0	\$2,500,000

*Capital Formation Budget for \$100M–\$200M Institutional Raise

Subject Lines That Work, And Why

- **3 subject line formats you can copy**

"How [Peer LP Type] is approaching [2025 Challenge]"

"What we sent LPs after [Hard Moment]"

"A 1-pager LPs are using to brief ICs on [Your Thesis]"

- **Curiosity> Cleverness**

- **Insight> Intro**

- **Funny As Sh*t**

But only after email 3 or 4

Real Example, Teardown

Scenario

Target: \$2B+ multi-generational family office

Style: Direct, credible, not needy

Context: Cold outreach

Fund: \$150M vehicle, real asset/AI strategy

Goal: Earn reply or deck request

Real Example, Teardown

"How other family offices are underwriting this cycle"

Hi Alisha,

We're speaking with a few large family offices who are triaging re-up gridlock and want clarity on how to underwrite 2025 vintages - especially in asset classes like ours.

We've put together a 1-pager showing how they're approaching this cycle: IC briefing structures, risk flags they're watching, and how we've designed reporting that supports LPs when things go sideways.

Happy to send it your way. If it's helpful, we also include a sample of the LP update we share when a deal underperforms.

Would that be useful on your end?

-Adam

Real Example, Teardown

Why This Works

TacticExplanation

LP empathy (re-up gridlock).

Opens with their pain, not your fund

Social proof (“other FOs...”)

Builds trust without name-dropping

Offer: IC-friendly 1-pager

Gives them a tool to make their internal case

Transparency angle

Sample update = you’re not hiding from downside risk

Short, no jargon, no attachments

Easy to read on mobile, doesn’t trip filters or waste time

The Capital OS Funnel

- **Your Anchor Research + Anchor Packs**

In 47 days, our GPs came up with 28 anchors. In 5 mins, we gave them another 13. Our GPs build \$182M in pipeline over 47 days. .

- **Hubspot CRM, Affinity or similar**

Stages/Pain for all anchor investors

- **Hubspot or Smartlead**

Outreach Automation for all hyper-personalized email sequences for the 6-7 people at each anchor to determine pain level

- **IR Calendar**

Tracked, qualified meetings

What To Do This Week

Figure Out The Exact Size of the Raise Including The 15% Buffer

\$100M = \$115M

Many investment firms under-budget because they fail to account for ops, cost of data warehouse, AI budget and LP and dealflow origination costs. **\$500K–\$1.2M/year**—just to play at an institutional level.

Figure Out Final Close Date

What day does the money really need to come in?

Figure Out The Gap In Your Raise - It's Most Likely An Anchor

Once you know the size of the gap, let us know. We can tell you if you actually do or don't need Capital OS. \$5–20M? You don't need it. That said, we're happy to introduce you to some LPs in our Discord chat.

Send Us The Exact Total In Your Pipeline

We will tell you how much money is going to come in and what date. We can do this from a CRM snapshot. We will not share your data.