



A Guide to Onboarding New Companies to Your VC Firm





Intro

We can all agree that first impressions are important. Whether we like it or not, our first interactions with someone or something, often sets the tone for the duration of the relationship.

This holds true when it comes to welcoming a new company into your fund's portfolio as well. Which is why it's important for Venture Capital Platforms to provide new portfolio companies with an organized, well-thought-out, first impression to their post investment support resources. This will help with company <> Platform engagement and is an opportunity to live up to your fund's brand promise.

If you're looking to improve your onboarding experience for new companies, check out the resources and templates in this guide to

This guide covers the following steps:

- 1) Sending your initial welcome email
- 2) Setting up your first introductory meeting
- 3) Sending out thoughtful swag
- 4) Integrating founders into your community
- 5) Scheduling a follow up meeting



Step One: Send an Initial Welcome Email

Your first communication sets the stage for the onboarding experience. We recommend including the following points in your email.

- Brief intro about you and your role
- An overview of resources available to founders
- A checklist to get them onboarded onto your systems
- Intake forms to fill out
- A link to schedule an Introductory Call with the Platform team

Welcome Email Template

You can also consider using the following email template.

To:

Welcome Onboarding Email

Hello [First Name],

Welcome to the [Fund Name] portfolio! My name is [Name] and I'm the [Title] at [Fund Name]. In my role at [Fund Name], I work with our [##] portfolio companies post-investment by [brief overview]. I'm looking forward to getting to know you all better and supporting your journey as you continue to scale!

To get things started, I want to share a few relevant items with you:

- Here is an overview of all the resources available to the founders in our portfolio
- Here's the checklist I'll be using to get you onboarded to all our systems, keep an eye out for these invites
- ****Action item:** Here's an intake form for you to fill out at your earliest convenience

We'll discuss these items on our Introductory call with our Platform team. It'd be great to get this scheduled for sometime in the next two weeks. Please use this link to find a time that works best for your team.

Again, welcome to the [Fund Name] community, we're glad you're here!

Regards,
[Signature]

Pro Tip: *Keep your Deal Team members in copy for a smooth handover and increased transparency.*



Step Two: Setting up an Introductory Call

It's a good idea to have an introductory call or even better, an in person meeting, within the first few weeks of closing a deal. This meeting should be about building rapport and clearly communicating and aligning on expectations. Here's a checklist of items to cover during the meeting:

- Friendly intros -- (the more you share, the more they'll share)
- An overview of resources available to them and how they can access them
- Set reporting expectations (how will the company send you their KPIs on a regular basis)
- Discuss areas they already know they want support and uncover new areas

Onboarding Presentation Template

Consider using a visual aid during this meeting to clearly communicate your points in an engaging manner.

You can check out and download our **New Company Onboarding Presentation Template** for inspiration.



[New Company] Onboarding

[Insert date here]

Pro Tip: *Keep this lighthearted and personable. Consider using a visual aid to communicate your post-investment support resources in an engaging manner.*

Step Three: Send Thoughtful Swag

It's important to remember the goal of sending swag shouldn't actually be about promoting your brand identity, it should be promoting your brand--in action--by giving a thoughtful gift founders will actually use.

Sending something useless with your VC's name in big bold letters and the swag will likely just end up in the landfill. This also sends the message you're thinking about YOU and not the founders.

Brainstorm swag ideas that are in line with your VC's brand that founders will actually love!

Here are some ideas...



Branded Marine Layer hoodies



Branded Coffee Mugs + co-branded local coffee



Branded Device Chargers

Pro Tip: *Keep your logo subtle and think about frequency of use.*



Step Four: Integrate them into Your Community

If the company is going to be an engaged part of your platform community, it's going to happen in the first few months of them joining your fund. The more time passes after a deal closes, the harder it is to engage them.

- Help them get registered for your first community event.
- Find out which areas they want to grow as a leader and intro them to another CEO who excels in this area.
- Keep an eye out for areas of cross-over and proactively make connections.

Pro Tip: Consider using [*Orbiit*](#) to foster relationships within your portfolio virtually.

Step Five: Schedule a Follow Up

Doing what you say you're going to do is one of the easiest ways to develop rapport with someone. Make sure to take good notes during the onboarding process and follow up on any action items you assigned to yourself.

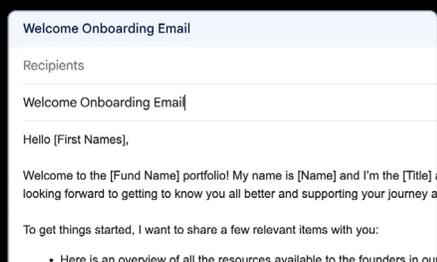
It's also a good idea to get the follow on call scheduled during your onboarding meeting to reduce back and forth via email later on.

During this follow up meeting, it's a good idea to:

- Refer back to notes from the onboarding
- Be open to feedback on your post-investment support
- Check in on any open action items
- Re-communicate reporting expectations

Related Resources

We hope these resources serve as a spark of inspiration for how to improve your new company onboarding process at your fund. Let us know if you have ideas that we should add!



Email Template for welcoming and onboarding new founders

[Learn more >](#)



Presentation template for hosting your introductory meeting with a new founder

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