

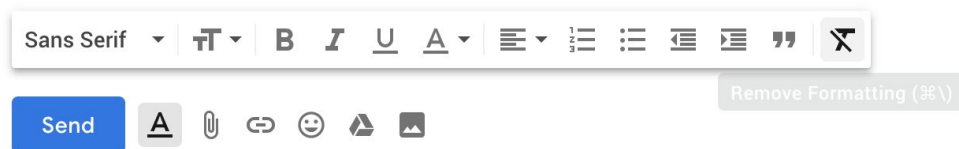
# **Emailing Guide for Investment Banking Recruitment**

## Important Information

1. Initial Cold Email
2. Initial Cold Email based on Reference
3. Follow up Email of Cold Email
4. Follow-up after Coffee Chats or Firmwide Presentation
5. Follow-up after Interview or Superday

## Important Information

- A. Do NOT all use the email templates below exactly as they are. They are meant to be a point of reference, but it will hurt you if everyone is using the same exact language.
- B. Professionalism
  - a. If you are emailing an analyst or associate, you can just address them in your salutation by first name—they are only 2-4 years older
  - b. If you are emailing a Vice President or Managing Director, you should address them using Mr. or Ms. in your salutation
- C. Do not send the same exact email to multiple people; tweak up the language a bit here and there
- D. Do NOT copy and paste emails **without removing formatting**; this will lead to formatting errors that will not be apparent when you send the email, but it will be very obvious on the receiving parties end if you just copy and pasted
  - a. If you are copy and pasting as a starting template, that is fine, but pay attention to point A) and use CMD + SHIFT + V (instead of just CMD + V) to **paste without formatting**
  - b. In Gmail, highlight your entire email and click the **REMOVE FORMATTING** button to be double safe



- E. Attaching resume is optional, but we would recommend doing so (see email templates below)
- F. Use an spreadsheet to keep track of your networking; being organized, remembering to follow up, etc... networking is a **numbers AND consistency game**

# Banking at Michigan

Current Date:	10/18/2018	Total Emails Sent:	69	Total Phone Calls:	23									
Bank (Current)	Past Banks	Name	Email	Position	Industry	Location	Connection to C Known Facts	Last Contact	Days since Last Cont.	Response	Notes	Potential Follow-up Alert	# Follow-ups	Called
Barclays				Analyst		NYC		2/22	238	Yes				
Barclays				MD		NYC		2/22	238	No				
Barclays				Analyst		NYC		4/26	175	No		X	4/26	X
Citi				HR				3/30	202	Yes				
Citi				Analyst		NYC		3/30	202	No		X		
Citi				Analyst		NYC		4/11	190	No		X	4/11	
Citi				Associate		NYC		4/11	190	No		X	4/11	
Citi				FIG Recruiter		NYC		4/5	196	Yes				X
Citi				Analyst		NYC		4/10	191	No		X	4/10	
Citi				Analyst		NYC		4/26	175	Yes				X
Evercore				Analyst		NYC		4/26	175	Yes				X
Evercore				Analyst		NYC		4/25	176	No				
Evercore				Associate		NYC		4/5	196	Yes				
Evercore				Analyst		NYC		4/4	197	No		X		
Goldman Sachs				Analyst		NYC		2/22	238	No				
Goldman Sachs				Analyst		NYC		3/23	209	No		X		
Goldman Sachs				Analyst		NYC		3/27	205	No		X	4/5 - followed up with gmail	
Goldman Sachs				Analyst		NYC		3/27	205	Yes				X
Goldman Sachs				Analyst		NYC		4/13	188	No		X	4/9, 4/13	
Goldman Sachs				Analyst		SF		4/5	196	Yes				X
Goldman Sachs				Analyst		NYC		4/25	176	Yes			4/6, 4/5, 4/18	X
Goldman Sachs				Analyst		NYC		4/6	195	No		X		X
Goldman Sachs				Associate		NYC		3/29	203	No				
Goldman Sachs				Analyst		NYC		4/23	178	No		X	4/23	
Goldman Sachs				Vice President		NYC		4/12	188	No		X		
Goldman Sachs				Vice President		NYC		4/13	188	Yes				X
Guggenheim				irs.com				4/11	190	No			4/11	
Guggenheim				Associate		NYC		4/11	190	No				
Guggenheim				Analyst		NYC		4/11	190	No				X
Guggenheim				Associate		NYC		4/11	190	Yes				X
Houlihan Lokey				Analyst		SF		3/26	205	Yes				X
Houlihan Lokey				Analyst		LA		4/3	198	Yes				X
Houlihan Lokey				Analyst		LA		3/28	204	No				
J.P. Morgan				MD		NYC		2/26	234	Yes				X
J.P. Morgan				Analyst		NYC		3/20	212	Yes	Called on 3/20			X
J.P. Morgan				SF		SF		3/15	217	No			3/15	
J.P. Morgan				Analyst		NYC		3/11	221	Yes	Called on 3/11			X
J.P. Morgan				Analyst		NYC		3/8	224	No				
J.D. Morgan				Analyst		NYC		1/13	315	No				

*Sample networking sheet used to keep track of networking. Take the time to make a system that works well for you and is easy to use.*

## 1. Initial Cold Email

Subject Line(s):

- Michigan Ross BBA interested in IB at [FIRM\_NAME]
- AKPsi Brother / Ross BBA interested in IB at [FIRM\_NAME]
  - Basically, if you have some form of connection with the contact (the person was in the same club or frat as you)

Hi [Name],

I hope this note finds you well. My name is [Your Name] and I am currently a sophomore pursuing my BBA at Michigan Ross interested in IB opportunities at [FIRM\_NAME].

I was wondering whether you would be available for a ~10-15 minute phone call in the coming weeks to speak about your experience at the firm. I understand you must be busy, but if you're willing, I'd be more than happy to find a time that works best for your schedule.

In case it's helpful to provide more context on my background, I have attached my resume below for your reference. I look forward to hearing back from you soon.

Best, and Go Blue!  
[Your Name]

## 2. Initial Cold Email based on Reference

Subject Line(s):

- Michigan Ross BBA interested in IB at [FIRM\_NAME]
- AKPsi Brother / Ross BBA interested in IB at [FIRM\_NAME]

Hi [Name],

I hope this note finds you well. My name is [Your Name] and I am currently a sophomore pursuing my BBA at Michigan Ross interested in IB opportunities at [FIRM\_NAME]. I recently spoke with [POINT\_OF\_REFERENCE] who mentioned you would be a great resource to learn from.

I was wondering whether you would be available for a ~10-15 minute phone call in the coming weeks to speak about your experience at the firm. I understand you must be busy, but if you're willing, I'd be more than happy to find a time that works best for your schedule.

In case it's helpful to provide more context on my background, I have attached my resume below for your reference. I look forward to hearing back from you soon.

Best, and Go Blue!  
[Your Name]

## 3. Follow up Email of Cold Email

*If no response, follow up after 5-7 days; follow up a maximum of 2x, and move on if no response after that*

Hi [NAME],

I hope this note finds you well. I wanted to touch base on your availability for a ~10-15 minute phone call in the coming weeks to hear about your experience at the firm and to get your advice on a few questions. I understand you must be very busy, but if you're willing, I'd be more than happy to find a time that works best for your schedule.

I look forward to hearing back from you soon.

Best,  
[Your Name]

## 4. Follow-up after Coffee Chats or Firmwide Presentation

Subject Line(s)

- Thank you for your time - [FIRM\_NAME] Coffee Chats at Michigan

*At firmwides, remember something from your conversation with the individual and include it in the email. Do NOT send the same thank you email to multiple analysts.*

### **Option 1: Ask to stay in touch**

Hi [Name],

We met Wednesday afternoon at the [FIRM\_NAME] Coffee Chats at Michigan. I wanted to thank you for your time in sharing your experience with the firm as well as sharing advice on how to approach the recruitment process.

I enjoyed hearing about your interest in Media and thought it was fascinating that you got to work on the "XXX" deal at the firm. I also appreciate you sharing stories from inside the firm and thought it gave a lot of insight into the "people first" culture at [FIRM\_NAME].

If it's alright with you, I would love to stay in touch throughout the recruiting process. Thanks again for all of your support and guidance.

Best,

[Your Name]

**Keep in touch with them and send them an email when the time comes to apply to the firm. They will be your internal champions who will help your resume get pushed through to an eventual first-round interview.**

## 5. Follow-up after Interview or Superday

Subject Line(s):

- Thank you for your time — [FIRM\_NAME] Superday

Mr. or Ms. [Name],

I appreciate your time earlier this morning during our interview. It was a pleasure getting to know you/other senior firm members and hear about your time at the firm. It was great to hear from a firm member who has been with the company since nearly the beginning and has experienced the tremendous growth the firm has seen.

After going through the superday experience and meeting both analysts and senior bankers, I am convinced that [FIRM\_NAME] offers an unparalleled cultural and professional experience. I look forward to hearing from the firm regarding next steps and would love to stay in touch. I hope you enjoy the upcoming weekend.

Best,

[Your Name]