

HOW TO USE MARKETING COLLATERAL IN THE SALES PROCESS

The institutional sales cycle is growing longer, and multiple meetings with the same groups of people can easily become repetitive.

The best way to keep each meeting fresh and informative? Develop a library of collateral marketing materials that are appropriate for each step in the sales cycle.

Initial Meeting - Introductions

- Firm History
- Manager Background
- Basic Q&A vis-à-vis the portfolio
- Who currently manages the allocation?
- Get their IPS Make sure you are qualified

Fact Sheet

- 2-4 pages
- Portfolio Performance
- Characteristics
- History
- Relative Benchmarks and Peer Group performance
- Manager Biography

Marketing White Paper

- For Alternative Managers, especially
- Make the case for your asset, then the case for your approach

Meeting #2: Positioning

- Take leadership of the sales process
- Assist the prospect with due diligence

Ensure your firm drives the conversation

 Position your firm as the "object" of the process, rather than being "subject" to things outside your control

Head-to-Head (H2H)Compares product against

- benchmark and peer groups across multiple datasets
- If you know who's currently managing the allocation, include their data as well
- Must accurately demonstrate why your firm's approach works best

Meeting #3: The 5 P's

- Focus shifts to how your firm handles its business
- Philosophy, Process, Product, People, Performance
- Marketing collateral must clearly demonstrate why your firm is best for the job

Pitch Book

- Bring out the heavy guns for the first time
- Pick one page that clearly highlights each of the P's to discuss
- Keep the discussion focused on your agenda

Meeting #4:

- Emphasize how your firm solves problems and addresses client needs
- Continue to focus on the 5 P's but do so within the context of your prospect's specific needs
- Continue assisting the prospect with their due diligence
- Get their DDQ if possible

Sample DDQ/RFP

- Think of it as your own "FAQ" document
 - Demonstrates that you know what clients want to know and that you have professional, thoughtful answers to those questions
- Demonstrates professionalism and industry awareness. You "get" it

Client DDQ Review

- Granular discussion about the compatibility between your firm and the needs of the prospect
- Determine who is in competition for the allocation? Who are you up against?

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Pre-Finals/Finals Presentation

- Close the deal
- Make the case for your overall approachEnsure you are sufficienly differentiated
- from the competition

By determining your competition in the prior meeting, you can compile a H2H that directly compares your performance

are advantageous to your case

Head-to-Head vs. the

 Make apples-to-apples comparisons between your firm and products against your competition

and portfolio characteristics in ways that

marketing and sales is data-driven.

Modern investment management

and competitive is what drives the establishment of relationships today.

Data that's accurate, comprehensive,

The sales cycle is lengthening and investment managers need multiple marketing collateral pieces in order to drive the discussion on their terms.

Click here to learn more about APX Stream's Marketing Collateral Services

Or email us at

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