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## ARK Market Leader Education Series: Marketing ABCs

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### Meeting Baseline Marketing Collateral Expectations

Investment managers have an amazing opportunity through technology in the 21<sup>st</sup> century; technology has leveled the playing field in a way never seen before. Today, a one-person investment management shop can compete for attention with a 500 person global organization through the power of technology. At least in regards to ‘being seen’ and ‘being heard’, managers have the opportunity to tell their story more efficiently and more broadly than ever before.

Why then, do we still see fewer *emerging* managers in the mix? (We will define emerging managers for this discussion as managers below \$1B in AUM at the strategy and/or firm level.) While we understand that having a certain amount of AUM and length of track record, as well as some bare minimum infrastructure is ultimately required, we believe it is also because manager’s fail to tell their stories.

In our experience, there are **three** core areas in which managers fail most often. Successfully implementing a marketing plan that delivers on all three attributes will go a long way in getting the market’s attention: ***Timeliness, Content, and Consistency.***

A baseline marketing collateral system is required to compete. This entails both a basic ‘scope’ of collateral built around core and differentiated content, as well as a commitment to timely and consistent distribution of the system.

#### Timing Is Everything

In regards to timing, it has become commonplace for managers to produce monthly performance updates on their strategies, regardless of the liquidity of the strategy and product structure in which it is sold. Quarterly is simply a long time in today’s 24/7/365 world. More detailed, qualitatively driven materials may still be produced quarterly. Regardless of which timeframe you commit to, all materials must be produced and disseminated as close to month/quarter end as is feasible. It is surprising that managers often believe their commentary, largely a regurgitation of what others have already said, delivered in month three following a given quarter, will be read. *The early bird gets the worm* applies to investment management as well.

#### Content Is King

Investors and research teams read lots of similar profiles. What interests them is what would interest you. *What makes you unique? How does your team view the market? What happened to your holdings/strategy last month? What market influences are you most focused on? Impacted by?* We encourage managers to strive to offer something ‘fresh’ to the market; something unique to them and to their way of thinking that is not likely to have been presented in the same way by a competitor.

#### Consistency Matters

One area in which we see managers of all sizes break down is in the consistency of their messaging. Research teams are adept at uncovering these inconsistencies and it is an easy reason to pass on an otherwise excellent story. They also, as they should, store what you send to them and keep detailed files, so making changes in the future becomes its own red flag.

#### THE ARK ADVANTAGE

From strategic positioning, through the tactical delivery of marketing, sales, and relationship management services, we partner with a limited number of boutique investment managers seeking access to institutional investors, and institutional investors seeking the competitive advantage of niche, researched investment managers.

To learn more about ARK and how we can help you call us at **800-676-2921** or visit us online at [arkglobalonline.com](http://arkglobalonline.com).

Consistency starts with taking the time to clarify your story and positioning before anything is created with your identity on it. First, be sure you have fully vetted your story. Outline your firm history and investment process in great detail and then have various team members tell the story. Determine if anything is consistently presented differently, left out, or overlooked. Do not presume what is ‘important’ to an investment research team or investor; different investors are seeking different attributes in each search. Focus on telling your story with as much clarity, efficiency, and process detail as you can.

Once you’ve confirmed and clarified your story, make sure that it is consistently delivered. *Do 100% of your materials share a consistent message about how you manage money? Does every piece created, whether electronic, hard copy or verbal presentation share the same consistent story? Are all members of your team who will interact with potential investors, including in office staff who will participate in on-site visits, on the same page regarding your Firm’s story and how it is to be told?*

### **Baseline Collateral System Profile**

There are many pieces that can factor into an effective collateral system. To ensure consistent firm representation across media the following components should be carefully reviewed and/or created to provide a professional presence from introduction through investor servicing.

- Logo
- Business Cards
- Notecards
- Envelopes
- Letterhead
- Website
- Email Signatures
- Email Introduction Template
- Firm/Product(s) Core Presentation  
*(Updated no less than quarterly)*
- Product Profile(s) - One page highlights with updated performance *(updated monthly)*
- Commentary - Firm or product level  
*(Monthly or Quarterly)*
- Firm Exhibit Template *(For single page exhibits and/or specific investor requests)*
- Client Reporting Template - *(Monthly or Quarterly)*
- White Paper/Market Brief Template

Taking the time to ensure that your story is effectively presented and told will increase your likelihood of success over the long term. The benefits of technology also create a notable challenge to managers; what you send from day one now most often becomes a permanent record in an investors and/or research team’s database. Taking the time up front to effectively tell your story, and ensuring timeliness, consistency and professionalism in everything you disseminate will ensure that your file is ‘investor ready’ when investors and research teams decide to allocate.