

ARK Market Leader Education Series: Marketing ABCs

Tale Telling: What’s Your Story?

As the famous movie line goes, “*What’s Your Story? Everybody’s Got A Story!...*” Before considering any marketing solution, consider your opportunity set and answer the ‘who’, ‘what’, ‘when’, ‘where’ and ‘whys’ of your firm. Marketers and Investors will often focus you on the 5 Ps of your presentation: People, Philosophy, Process, Performance and Price. In our experience, while this should be eloquently and efficiently covered throughout your marketing collateral, and preferably in the order presented above, first establishing an easy to follow, and differentiated story is critical. We see managers time and again who change their stories, are inconsistent with their areas of differentiation and who leave out critical details, rendering their presentation confusing and often misleading. Take the time to fully vet your firm’s story—its history, culture and investment process. Leave no detail out on your initial review.

Story Component	Questions/Considerations	Firm Response
WHO	<ul style="list-style-type: none"> • Profile each team member • Create an organizational chart • Include vendor/outsourced partners • Consider ‘TBH at X AUM’ positions in org chart • Create a vendor contact sheet for due diligence and keep it current 	
WHAT	<ul style="list-style-type: none"> • Define your firm’s IM philosophy • Define your firm's IM process • Provide 2-3 IM examples regardless of strategy type (can be security, markets or process specific) • Define any Investment Committee or other structural components of your process • Create an exhibit outlining technology used in your IM process and how it is used including data sources; IM tools, etc. • Are there any aspects of your process that have NOT been covered in the above? Historical changes? Added ‘steps’ in the process for QC? Additional databases utilized? Ongoing back testing/model work? 	
WHEN	<ul style="list-style-type: none"> • Create a firm timeline from firm inception (or sooner if team members worked together previously) to current date • Include a set of ‘highlights’ of key events such as product launches, AUM hurdles, industry recognition, new hires, etc. 	
WHERE	<ul style="list-style-type: none"> • Define how the strategy fits into a diversified portfolio • Where should the assets come from to invest in you? • How might the strategy fit in regards to correlation and unique names/approach 	
WHY	<ul style="list-style-type: none"> • Why you? Define your greatest differentiators • Why now? Why is now a good time to be adding/investing in your strategy? 	

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.