



MARKETING MATTERS:

Alternative Investment Insights

BUILDING BRANDS, GENERATING LEADS, DRIVING GROWTH

Why Does Marketing Matter?

Why is marketing important to alternative investment firms? Marketing nurtures your clients throughout the sales funnel; attracting new clients, nurturing the relationship with the ones you have, and creates the kind of trust that builds loyalty to your firm. Marketing is the vehicle to showcase your expertise, differentiate you from your competitors, and maintain your reputation. Sounds great, right? But where do you start?

Have a Plan

Having a marketing strategy is crucial for alternative investment firms as it provides a roadmap for achieving objectives and reaching your target audience effectively. It enables you to identify your target market, understand your customers' needs and preferences, and develop tailored messages and offerings that resonate with them. By continuously evaluating and refining your marketing strategy, you can adapt to changing market conditions, stay ahead of competitors, and foster long-term growth and success.

“People don’t buy what you do; they buy why you do it.” - Simon Sinek

Branding

Branding is establishing your “why.” When marketing falls flat, it’s often because it was not built on the foundation of effective branding. Having a brand strategy builds the identity of your firm — its values, expertise, and personality. Your brand’s voice and appearance should represent your firm’s mission and values, from the tone of your messaging, the messaging itself, taglines, and slogans, to your logo, typography, and color palette. Establishing your brand’s identity is the first step to ensuring your firm’s marketing is consistent.

Marketing Strategy

Marketing brings visibility to your brand. Your marketing should:

- 1. Build trust and credibility:** Effective marketing helps alternative investment firms establish trust and credibility with advisors and potential investors. By showcasing expertise, past performance, and industry knowledge through marketing materials, firms can instill confidence in their abilities to deliver returns.
- 2. Attract clients:** Marketing efforts help alternative investment firms attract advisors and investors. By effectively communicating the value proposition of their investment products or strategies, firms can pique the interest of advisors and individuals looking to diversify their portfolios.
- 3. Differentiate you from your competitors:** In a crowded marketplace, marketing helps alternative investment firms differentiate themselves from competitors. Through branding, messaging, and positioning, firms can highlight what sets them apart, whether it's a unique investment approach, specialized expertise, or superior customer service.
- 4. Educate your clients:** Alternative investments often require a certain level of understanding and sophistication on the part of advisors and investors. Marketing materials can play a crucial role in educating investors about the opportunities, risks, and complexities of alternative assets so that they can make informed decisions.
- 5. Expand reach:** Effective marketing strategies enable alternative investment firms to expand their reach and tap into new advisor and investor pools. This may involve leveraging digital channels, participating in industry events, or forming strategic partnerships to reach potential investors who may not be familiar with the firm's offerings.
- 6. Manage your reputation:** Marketing enables alternative investment firms to uphold their reputation and image in the market. Through interactions with advisors, investors and stakeholders across communication platforms, sponsors can tackle issues, address questions, and uphold a favorable image even during challenging situations and market conditions.

STRATEGY STRUGGLES



41%

of alternative investment firms struggle with **differentiating** themselves from competitors



36%

struggle with effectively **communicating** their investment strategies to investors

Source: Preqin, The Future of Alternatives



Key Marketing Tactics

Implementing a multi-channel marketing strategy increases brand visibility and expands your firm's reach. Taking a tactical approach will allow you to tailor your message by medium and audience, increase engagement, and utilize your resources effectively.



PROFESSIONAL WEBSITE

Maintain a professional and informative website that serves as the central hub for information about the firm and its investment products. The website should be user-friendly, visually appealing, and optimized for search engines to attract organic traffic.



EDUCATIONAL CONTENT

Produce high-quality educational content that helps investors understand alternative investments, the firm's investment strategies, and the potential risks and rewards. This can include blog posts, whitepapers, webinars, videos, and other resources that demonstrate thought leadership and expertise.



DIGITAL PRESENCE

Establish a strong digital presence across various online channels, including social media platforms, industry forums, and investment-related websites. Engage with investors and stakeholders through these channels to increase brand visibility, foster relationships, and drive traffic to the firm's website.



COMPLIANCE

Ensure that all marketing materials and communications comply with relevant regulatory requirements and industry standards. This includes disclosures, disclaimers, and adherence to guidelines set forth by regulatory bodies such as the Securities and Exchange Commission (SEC) and Financial Industry Regulatory Authority (FINRA).



EMAIL MARKETING

Tailor your marketing messaging and communication to effectively reach the firm's target audience. This may involve segmenting advisors and investors based on demographics, investment preferences, or other criteria, and crafting personalized messages that resonate with each segment.



Key Marketing Tactics CONTINUED ▶



THOUGHT LEADERSHIP

Position key executives and investment professionals as thought leaders in the industry by participating in speaking engagements, contributing articles to industry publications, and engaging in media interviews. This helps build credibility and authority within the investment community.



LEAD GENERATION

Implement strategies to generate leads and nurture relationships with potential advisors and investors. This may involve offering gated content, hosting investment seminars or webinars, and utilizing email marketing campaigns to capture leads and stay top-of-mind with prospects.



PERFORMANCE REPORTING

Provide transparent and comprehensive performance reporting to existing investors and their advisors, demonstrating the firm's track record and commitment to accountability. This builds trust and confidence among investors and helps attract new capital.



OFFERING MATERIALS

Highlight your unique value proposition and differentiate yourself from competitors by equipping your sales team with effective offering materials. These materials can include brochures, pitch decks, fact sheets, and case studies detailing information about the firm's investment strategies, track record, and performance. By equipping your sales teams with compelling collateral, you can effectively communicate the benefits of your investment offerings, address investor concerns, and ultimately facilitate decision-making, leading to increased advisor and investor interest and capital inflows.

It Takes Time

Establishing a brand presence and growing a marketing strategy does not happen overnight. The process involves research, fostering relationships, and investing in diverse marketing channels. It entails developing trust and credibility by fulfilling promises and consistently meeting investor and advisor expectations. All of these efforts take time to produce substantial outcomes. Building brand recognition and expanding your marketing program is a journey that demands patience, perseverance, and a thought out strategy.

Who is Marketing Intent?

OUR TEAM

We've developed a trusted network of marketers to assemble the team most appropriate for each client engagement. We pair the right specialists with your marketing needs, managing projects, and people so you can focus on your business. Our network includes marketing professionals with deep experience working with a wide range of financial services, alternative investments, and commercial real estate firms.

LEADERSHIP

Cherie Fournier, CEO & Founder

I began my career at 22 when I started an internship that led me down the path of an unassuming multi-decade marketing journey in financial services. At the time I knew little about financial services, but I learned quickly and grasped the importance of helping explain financial concepts to both advisors and investors. I was fortunate to start out in a role that reported into sales, which helped me understand the positive impact of marketing and sales alignment. The mantra “nothing happens until something is sold” has been foundational to my marketing approach, ensuring marketing is a partner to sales — not a competing force.

EXPERIENCE

- 25+ Years Marketing in the Financial Services Industry
- 15+ Years Marketing Alternative Investments

Alise Lucero, VP, Client Success

In 2007, as I was beginning my professional career, I focused on the advice my parents gave me — it isn't always about what you know, it's also about who you know. Life takes a village and developing the relationships to keep people in your corner will always prove to be a valuable asset. Luckily, I had surrounded myself with people who were invested in me and my success. Starting on my journey of finding my first career job, a dear friend set me up with a recruiter who had a position available at a firm that many young professionals were trying to get into. I landed the job. That one introduction jump-started my career and steered me onto a path in marketing that was meant for me. In my role as a marketing assistant at Dividend Capital, I was immediately acclimated to the truth that marketing and sales work together towards one goal — to help the firm succeed.

EXPERIENCE

- 15+ Years Marketing Alternative Investments



**CONTACT US TO START
MARKETING WITH INTENT**



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The proliferation of marketing tactics can be overwhelming. And not all marketing is for every firm. We help alternative investment sponsors bridge the gap between marketing and sales to help raise capital. Marketing to create sales activity — not marketing because you should.