Maximizing Conference Marketing

The financial commitment associated with conferences is substantial. From sponsorship and attendance fees to exhibition costs, time away from the office, and client or prospect entertainment expenses, it all adds up.

The question is, are these expenses still delivering the same return on investment as they used to? If not, it's time to consider how you can maximize your conference marketing. In this report, we'll provide tips to do just that.

Pre-Conference Marketing

Some of the most impactful marketing you can do around a conference is before it even starts. Below are several pre-conference marketing ideas to consider for your next event.

EMAIL & DIRECT MAIL

Email is still a performer in our industry with high open and engagement rates by advisors. Plus, it's low cost. And let's not ignore an old classic — direct mail. If you have a solid list of addresses, pre-conference direct mail stands out even more today as fewer firms are investing in it. Be unique in your approach — keep it short and impactful. And consider using a theme that you'll tie into your in-conference and post-conference marketing.

- Build brand awareness
- Help advisors associate your firm's name with your asset class/investment type
- Inform attendees on how to find you at the conference — booth, presentation, sponsorship of lunch, etc.
- Pre-schedule 1:1 meetings at the event (e.g., Calendly link/ QR Code)
- Keep it short and impactful

LINKEDIN POSTS

The alternative investments industry underutilizes LinkedIn. We know what you're thinking…what about compliance? We've seen a trend among compliance departments of greater comfort in social media when you're promoting attendance/participation at an event, not promoting a product. Keep posts high level and use imagery to indicate your asset class (e.g., self-storage, industrial, etc.).

- Build brand awareness
- Help advisors associate your firm's name with your asset class/investment type
- Inform attendees on how to find you at the conference — booth, presentation, sponsorship of lunch, etc.
- Humanize your firm by showing pictures of who will be attending the conference from your firm

SALES CALLS TO ATTENDEES

Ok…this one may be sales, but don't pass up the chance to contact attendees by phone before the event.

- Provide a human touchpoint, which can translate into warm networking at the event
- Schedule 1:1 networking at the event & follow-up with a calendar invitation to confirm it

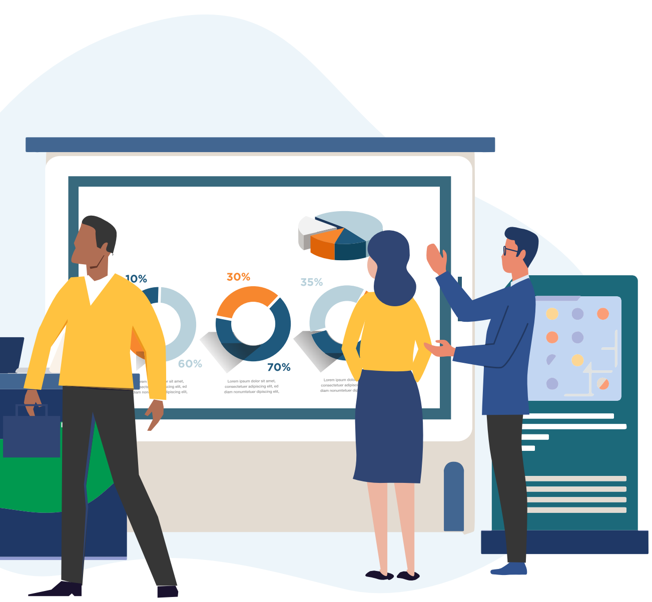
In-Conference Marketing

In-conference marketing – what you do at the event – is where you get to make an impression and build relationships with advisors. Plan to maximize the valuable facetime and your firm's brand presence.

SPONSORSHIP OPPORTUNITIES

Sponsorship opportunities range from conference to conference. As you evaluate which to take advantage of, consider the visibility it provides you compared to its pricing.

- Go beyond your logo for brand awareness
- Use a tagline to indicate your asset class/type of investment
- If sponsoring an event at the conference (e.g., a cocktail hour or lunch), use that to introduce yourself/your firm to those advisors participating



BOOTH

Booths in an exhibit hall can be a dime a dozen with nothing incenting advisors to stop and engage. Think about how your booth can create an experience for an advisor vs. just a stroll by to pick up the latest conference tchotchke.

- Ensure your booth display indicates your asset class/type of investment at a glance — don't make advisors figure it out
- Make your booth "sticky" — something that requires advisors to stick around or encourages them to visit longer or multiple times
- Engage with advisors while they are a captive audience
- Choose booth premium items and giveaways thoughtfully
- Tie into your asset class/investment products or create a theme that lends itself to marketing messaging
- Create exclusivity, like "giving away" a 1:1 meeting with your management team

PRESENTATION

Ensure your presentation is engaging, easy to read, and tailored to your time slot — with time for Q&A.

- Do not include slides you plan to skip over or that are word walls
- Every slide should be intentional and covered
- Spend 20-30 seconds per slide to keep your audience engaged
- Use large fonts and graphics that don't require squinting
- Go without a PowerPoint — consider props, handouts or videos
- Ask questions at your own Q&A
  - What do advisors need to offer your fund?
  - What is their biggest information need?
  - What types of sales and marketing contact do they prefer?

EMAIL/SOCIAL

Another underutilized marketing tactic for conferences is sending email and social while at the conference. Both allow you to bring your firm top of mind with advisors where it counts most — when a face-to-face conversation is a possibility.

- Remind advisors about your presentation and who is attending from your firm
- Encourage advisors to visit your booth
- Include a link in an email for advisors to set up a post-event meeting or request additional information

NETWORKING

Networking at conferences takes many forms. Setting up 1:1 meetings for the event pre-conference helps you maximize your networking.

- Show up on time and with enthusiasm for your pre-scheduled 1:1 meetings with advisors
- Be respectful of advisor's time
- If you have someone from asset/investment management from your firm, remind attendees they are available for 1:1 meetings while at the conference

Post-Conference Marketing

EMAIL/DIRECT MAIL

Go beyond the typical "thank you" email and consider using direct mail to build on your firm's exposure at the event.

- Offer something of value (e.g. thought leadership/ practice management report) that needs to be downloaded so you have an intent signal from advisors
- Answer questions that came up about your firm/product at the event
- Encourage a meeting with the advisor's wholesaler via a Calendly link/QR Code

LINKEDIN

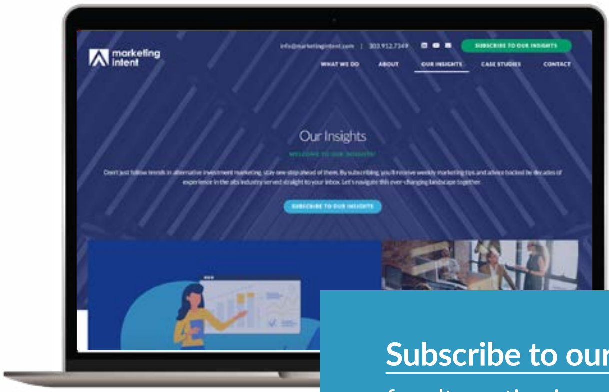
Connecting with advisors on LinkedIn allows you to show up where they are, create brand awareness and build trust.

- Invite advisors who engaged with your firm to connect on LinkedIn and to follow your firm's page
- Post about key takeaways/highlights from the event
- Post photos/videos from the event
- Add value — link to a landing page for advisors to download a thought leadership or practice management piece

SALES FOLLOW-UP CALLS TO ATTENDEES

Many attendees will have follow-up questions about firms or offerings — or want additional information. Sales follow-up calls allows your firm to answer those questions and engage with advisors.

- Warm leads introduced to your firm at the event or through event marketing
- Opportunity to keep the conversation going



Subscribe to our insights
for alternative investment asset manager tips

Explore How We Can Help You Maximize Your Conference Marketing.

Email: info@marketingintent.com
Phone: 303.912.7349

ABOUT MARKETING INTENT

We are a sales-focused marketing group specializing in alternative investments. We help asset managers raise capital and bridge the gap between marketing and sales. And we happen to speak your language. Our team requires little ramp-up time due to our deep background in financial services, alternative investments and commercial real estate. We know the ins and outs of marketing as well as compliance regulations. And we understand how to get financial advisors to engage with your firm. Our work makes your clients take notice.