



Maximizing Video Marketing

As the market for alternative investments continues to grow, it's important for sponsors to consider employing a mix of marketing tools to generate advisor interest in their firm and their offerings.

Alternative investment sponsors are always on the lookout for new ways to attract advisor interest, hoping each new marketing campaign will expand their reach. But what many don't realize is that “new way” — video — can be used in several ways.

Video marketing can be a game-changer for alternative investment managers. This paper explains why video marketing is important, suggests different ways to put it to use, and offers tips on how to make your videos shine.

What the Data Show

In a 2024 report by prominent marketing platform HubSpot, a survey of 1,460 B2B and B2C marketers across the globe identified short-form video as their preferred media format, and a majority said they believe it provides them their highest return on investment.¹

The video marketing boom comes amid rising interest in alternative investments among financial advisors, with many signaling plans to increase allocations to alts in the future. A 2023 independent survey of advisors conducted by CAIS and Mercer found that 85% expected to boost allocations to one or more alternative asset classes further within the next year.²

As markets become more interconnected across digital platforms and service providers, it makes sense that these survey results, taken together, could become a catalyst for change in the alts industry. As you'll see, there are many ways for sponsors and wholesalers to use video marketing to reach more advisors interested in alts.



Video Marketing Strategies

There are many different video marketing strategies you can employ to engage with financial advisors. Your videos can be short and simple, cover complex topics, address a general audience, or be custom-tailored for an individual recipient.



LIVEN UP EMAILS WITH VIDEO

Wouldn't it be nice to receive an email that didn't have canned messaging? "Thank you," "have a nice day," and other phrases sound more sincere when they're directly spoken to you rather than typed out in an email. So, why not embed a video message in your next email? Your contacts will appreciate the human touch and your tone and overall message will come across more clearly. Video response emails can be recorded on a smartphone and help deepen connections you make by referencing a previous conversation or by adding a personal note.

Some customer relationship management (CRM) platforms have widgets that can easily embed videos in emails. Some email providers support embedded video, others don't, so it's worth exploring what your email system provides.



OPTIMIZE SOCIAL MEDIA POSTS AND ADVERTISING

Social media posts and advertising can benefit from video to garner attention and help build trust. Social advertising (*like LinkedIn*) offers quick results, targeting capabilities, and advanced analytics. Experiment with different video ad variations, optimize messaging, and refine your approach to find what resonates best with your target audience.



SHOWCASE COMMERCIAL REAL ESTATE OFFERINGS

Our everyday use of digital media encourages us to scan content rather than read it like a book. This saves people time, but it has also made us less patient with brochures and printouts. Learning about an investment offering shouldn't make your eyes glaze over; it should excite advisors and investors, and who doesn't love a site tour?

You can't walk everyone through a property, but you can easily share a video of one. Ways to approach this strategy include filming the property and the surrounding area using drone technology and professional video production. When creating a property video:

- Be thorough. Highlight the property's exterior as well as its interior finishes and amenities.
- Every property has a story. Use your video to tell that story, including information about the larger real estate market it's situated in.
- Include text and bullet points that highlight key aspects of the property or that provide details you wish to share about your firm.
- Include stock video to provide helpful context and keep the viewer engaged.





PROVIDE INVESTMENT PERSPECTIVES AND APPROACH

Some things are just easier to explain verbally. Rather than send out another detailed white paper explaining your firm's investment perspective or its approach to a complex topic, tell advisors what they need to know in a video. They're more likely to listen to what you have to say then and there, rather than set aside a lengthy read for later.

Videos can be a good way to cover complex topics such as 1031 exchanges or business development companies — subject matter that can be made far less dry when explained in everyday language by someone genuinely invested in the topic.



GIVE ADVISOR-FRIENDLY UPDATES

When providing updates on real estate investments, communications can be filled with jargon and required legalese. The fine print is important, but why not cut through the jargon and use a video update with plain language to keep advisors informed? Providing a personalized video update along with the required disclaimers will enliven your message and help boil it down for advisors.

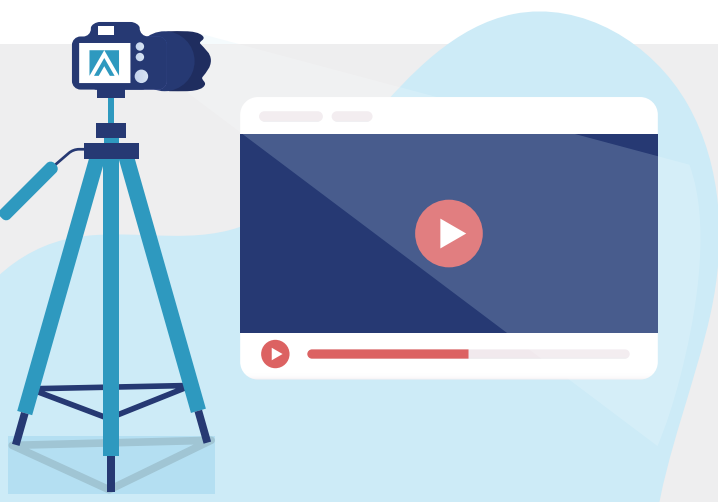
Making Your Videos Shine

Some people take naturally to public speaking and aren't in need of speechwriters. But if you need help, prepare a script by following these steps:

1. Determine your overall goal for the video and what it is you want to communicate.
2. Decide how long you think the video should be.
3. Write your script with the intent of making it match its targeted length (typically 150 words equals one minute). A 2-minute video is typically the sweet spot.
4. Decide what will be spoken and what will appear on screen.
5. Submit your script to compliance and make any necessary changes.
6. Indicate the types of stock video or other imagery you wish to incorporate into the video for reference by your video production company.



Video marketing can make all the difference in an industry known for change and always in need of educational resources. A solid video marketing strategy can help sponsors and wholesalers elevate their firm and create a lasting relationship with advisors and investors.



Need Help Getting Started With Video?

Contact us to evaluate your marketing plan and see where video can add value:

EMAIL: info@marketingintent.com

PHONE: 303.912.7349

SOURCES

¹<https://blog.hubspot.com/marketing/hubspot-blog-marketing-industry-trends-report>

²<https://www.caisgroup.com/our-company/press/cais-mercator-survey-finds-advisor-demand-accelerating-for-alternative-investments>



*We are a sales-focused marketing firm specializing in alternative investments. We help alternative investment sponsors 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.***