



Preparing to Go to Market: Differentiating Yourself and Defining Your Edge

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Are You Prepared to Go to Market?

- What do *your* prospects consider most important decision factors?
- Can investors distinguish *your* firm from the competition?
- Do you highlight general qualifications or *your* unique attributes?

Why Differentiate Yourself?

- Showcase your strengths
- Enhance your image
- Position yourself effectively
- Win loyalty of prospects
- Break through competitive environment
- Raise assets

Preparation for Market Readiness

- Know your audience and motivate them
 - ◆ Focus on relevant credible benefits
- Research the competition
 - ◆ Highlight unique capabilities
- Communicate consistently
 - ◆ Emphasize same message across multiple mediums
 - ◆ Apply corporate identity to achieve branding

Content Guidelines

- Organize your message carefully
- Define your edge
 - ◆ Focus on 3 key concepts
 - ◆ Highlight benefits to your target market
- Forget the hype, state the facts
- Keep your presentation brief

Preparation – Content Essentials

- Overall investment strategy employed
- Competitive/sustainable advantage(s)
- Process of research and investing
- Risk management and operational depth
- Qualifications of key people
- Contact information

Marketing Tool Kit

- Create or improve your marketing tool kit
 - ◆ “Permanent” vs. time-sensitive
 - ◆ Collateral items – pitch book and others
- Utilize professional design and packaging
- Company vs. Product level
- Multiple platforms and delivery options
 - ◆ Print, mail, web/email, speaking/in-person

Marketing readiness – checklist

- ✓ Competitive edge – up to 3 advantages
- ✓ Corporate identity – distinct look and feel
- ✓ Collateral – corporate + product capabilities
- ✓ “Off the shelf” + audience-specific
- ✓ Initial pitch book + updates/newsletters
- ✓ Qualifications – resumes (highlights)
- ✓ Published articles or news quotes
- ✓ 1-2 page summary – qualitative + quantitative

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