

# Marketing Communication: Best Practices for Presentations

Capital Round Table

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# Positioning & Brand

- What are these?
- Why are they important for your fund and for your firm?

# Definitions

## Positioning

“... positioning is not what you do to a product. Positioning is what you do to the mind of the prospect.”

*Source: Al Ries and Jack Trout, Positioning: The Battle for your Mind*

## Brand

“a name, sign or symbol used to identify items or services of the seller(s) and to differentiate them from goods of competitors.”

Note: brands are not necessarily positive!

# Your Edge

- What is your competitive advantage?
- How do you differentiate yourself?
- Who needs to know?

# Collateral – Preparation

- Organize your message carefully.
- Focus on a few key concepts that sell well to your target market.
- Forget the hype, state the facts and get legal/compliance approval *prior to* distribution of your message.

# Collateral – Critical Content

1. Summary – firm, strategy, people, edge
2. Investment strategy
3. Process of research and investing
4. Infrastructure
5. Biographies – management team
6. Contact information

# Collateral design – Visual Impact

- Corporate identity
- Product level
- Professionalism
- Consistency across all collateral

# Marketing Tool Kit

- Create or improve your marketing tool kit
  - ◆ “Permanent” vs. time-sensitive
  - ◆ Collateral items – pitch book and others
- Company vs. Product level
- Multiple platforms and delivery options
  - ◆ Print, mail, electronic, in-person

# Marketing Readiness – Checklist

- ✓“Elevator pitch” – Your edge
- ✓Corporate identity – distinct look and feel
- ✓Collateral – corporate + product capabilities
- ✓“Off the shelf” + audience-specific
- ✓Investor updates

... and think about visibility opportunities such as speaking, articles, interviews ... be creative.

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