

"The Marketing Alpha Process[©]" For Sub-Institutional Managers

1. D.O.M.I.N.A.T.E. – The Marketing Process To Consistently Raise Assets!
2. Understanding and executing the “6-steps” in the allocation pathway.
3. PROCESS is The “New” Performance: The articulation of enterprise-wide process execution for alpha.
4. STOP PITCHING! START PRESENTING!: PROFILE - PREPARE – PRESENT
5. "INVESTOR-CENTRIC": Know the CLIMATE; understand the CONTEXT.
6. "PROSPECT-SPECIFIC" Engagement: The RIGHT Person, the RIGHT Story at the RIGHT Time.
7. Conversation Points: Creating prospect-specific conversation modules.
8. Scripting - Building your prospect conversation script.
9. How to reduce the cost of marketing, increase speed raising assets and momentum in AUM growth.
10. Private Wealth: The Psychology of Ultra High Net-Worth Individuals, Families & Family Offices
11. Avoiding the "Field of Dreams" mentality: "If YOU build it; THEY won't come!"
12. Marketing in Crisis, Chaos & Conflict to "CLOSE".
13. Close Encounters of the 3rd Kind: Third Party Marketers - Limitations & Managing Expectations.
14. DATA: The goldmine for marketing and success raising assets.
15. 4-Quadrant Profiling (4QP): The master key to organically build relationships and the marketing pipeline.
16. The #1 Rule of Consultative Engagement: "Prescription Before Diagnosis is Malpractice!"
17. Negative Selection: How the operational execution blueprint impacts raising assets
18. The RFP Process: Manager selection within the institutional segment.
19. Manager Databases and Platforms - "Post & Hope!": Do they deliver results?
20. ODD-ready! How to minimize, compress and pass operational due diligence.
21. Collateral and content development: One size DOESN'T fit all!
22. The Monthly Comment: Does it get read? or Go in the garbage?!
23. Learn the communication style to build trust + relationships of conviction.
24. EQ > IQ: Using your "Emotional Quotient" (EQ)" to build stronger relationships and raise assets.
25. Don't get CON'D! Why CON-ferences are a waste of time and money for small sub-institutional managers!
26. De-CAPitated! - How to work efficiently and effectively with prime broker cap intro.
27. "The 7 Elements of Style" – Avoid fatal marketing mistakes raising assets.
28. Measurement: Metrics Matter! - Get Answers. Manage Actions. Achieve Results.
29. Intermediation (consultants): Behavioral drivers, structural issues and engagement.
30. "Going Institutional" - The critical elements to attract institutional assets.
31. Vendor Selection: Service Providers -vs- Service Partners!
32. Enhancing The Manager/Fund Profile: Operational Stability, Continuity, Consistency & Accountability.
33. Seeding, Incubation, First-Loss and Acceleration Capital: Real Options or Hype?!
34. LIGHTS! CAMERA! ASSETS?! – The use of social media and video.
35. NO FREE LUNCH: The REAL cost of marketing and raising assets for new and smaller managers.
36. Creating the marketing and fundraising budget to achieve your capital raising goals.

ELIMINATING THE “BS” ABOUT MARKETING & RAISING ASSETS.