



## A structured one-year training programme focused on developing the brightest marketing talent in fund management

The Fund Marketing Academy is designed to provide a tailored learning, mentoring and networking forum exclusively for marketers within the fund management industry. Taking place over nine months, the Academy provides structured training, enhances knowledge and provides a platform for marketers to learn from and share challenges and experiences with peers in the industry.

The course is made up of five, one-day sessions each running from 9:00am to 6:00pm. Each day is focused on a core marketing subject, offering insights and debate from industry experts and small structured workshop groups. These workshop style sessions provide an intensive, effective learning environment where each delegate is expected and encouraged to contribute.

The course runs over a nine month period from September to June and is limited to 33 participants, to promote a more immersive and hands-on learning experience.

### The FM Academy is designed for:

Specialist marketers looking to broaden their knowledge across the full marketing mix

Generalist marketers looking to deepen their marketing skills to enhance career progression

Experienced marketers keen to grow their network, confidence and industry expertise

### What you get:

Five distinctive and immersive full day learning modules

Interactive, hands-on learning with practical, tangible outcomes

A ready made network of peers, mentors and industry experts

Register via our website [fundmarketingnetwork.com](http://fundmarketingnetwork.com) or email [hello@fundmarketingnetwork.com](mailto:hello@fundmarketingnetwork.com)

## Key benefits

- Deepens knowledge and understanding of the changing asset management landscape, distribution, the client base, regulation and other external influences
- Provides new ideas and perspectives on marketing strategy and the communications mix, how to apply it and why it matters
- Delivers a structured, development programme including a forum with other future marketing leaders



## The full programme includes:

**UK Market Distribution Landscape:** A deep dive into the industry we work in, providing fresh insights into its changing dynamics, distribution channels and the impact this is having on marketing

**Strategic Campaign Planning:** Looking at what campaign means in today's context, how do we plan, execute and effectively measure to ensure commercial success

**Effective Content Strategy:** Challenging how to effectively communicate with customers and make your content work harder

**Digital Dynamics:** A lively and interactive day understanding the changing digital landscape, and what this means for marketing in the digital world

**Leadership in Action:** Concluding our programme, we work on individual management styles, how to influence and effectively communicate and manage your key relationships

## Cost

- £2,950 plus VAT
- Discount available for multiple bookings and for businesses already subscribed to the Fund Marketing Network

## Course details

- 12 Hay Hill, London, W1J 8NR
- 26th September 2018, 28th November 2018, 6th February 2019, 10th April 2019 and 5th June 2019

## What previous attendees say:

"A brilliant platform to hear from amazing speakers, meet lots of people in the industry and have a great network afterwards"

**Artemis Investment Management**

"Thought provoking, varied and relevant to our current challenges"

**BNY Mellon**

"Very engaging speakers, great thought provoking discussions and good opportunity to speak to others in the same industry"

**Architas**

"Very relevant content, invaluable sessions and interesting speakers"

**Aviva Investors**

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FUND  
MARKETING  
ACADEMY



## Day 1: UK Market Distribution Landscape

The launch day for the Fund Marketing Academy brings insight within European markets across key customer bases. The morning session will give us solid information to showcase the market changes, and how differing institutions have adapted strategically, and the afternoon will host a series of interactive workshops focussing on understanding the evolving platform space, institutional clients and complexities of wealth managers. This day aims to offer a broad overview of the market to provide solid foundations for the remaining four days.

- \* The context of how the market has evolved in recent years to our position today
- \* Where to from here? How fund management groups had to respond to changes in risk appetite, product demand, regulation and distribution dynamics
- \* How the institutional market has adapted and changed against the macro backdrop
- \* Explanation of the FMA assignment
- \* Understanding the needs of high net worth investors and how this informs our communication and marketing strategies
- \* Recent findings from The Platform in relation to the changing distribution space
- \* Strategic approach and thinking when positioning your company and product range to different audiences in the institutional market

## Learning outcomes

- \* Learn the history and change in the asset management industry, the value chain and the “ownership” of the client relationship; and the purpose of the industry
- \* Gain an understanding of the clients’ needs, how they’re changing and what the industry needs to do to keep up with the changing dynamics in sales and distribution
- \* Understanding the dynamics and patterns of change in pension provision and the needs of institutional investors
- \* Discuss outcome and liability-driven investing
- \* Find out how to translate investments and investment opinion into effective client communications
- \* Learn how funds are bought and sold, and how it’s changing
- \* Discuss types of platform and 3rd party relationships
- \* Learn the needs to different investor audiences and how to prioritise target audiences for your investment offering



## Day 2: Strategic Campaign Planning

Day two looks at strategic campaign planning, from effectively segmenting your audience and using the evolving retirement space as a case study. The day will aim to give you key takeaways in strategic planning, internal communication and ROI, leveraging research and clearly articulating your success stories to inform future marketing and business strategy.

- \* The power of your brand within campaign strategy
- \* Traditional campaigning has had its day. The future belongs to targeted, integrated and measurable marketing
- \* Planning, KPI setting, budgeting, resourcing and reporting on your campaigns to best effect within your business
- \* Case study and theory for campaign best practice
- \* How to use research in informing effective campaign strategy
- \* The differing tools available to and when to use them/How to brief properly
- \* How to approach segmentation for effective campaigns

## Learning outcomes

- \* Learn the power of brand in asset management, and its importance as the basis for all activities, communications and the client experience
- \* Explore the future of campaign marketing
- \* Discuss the power of integrated targeted campaigns
- \* Learn how to measure and evolve your campaign activities
- \* Understand how to set KPIs in line with business strategy and commercial objectives
- \* Find out what to measure, how to measure it and what you can learn
- \* Understanding the importance of segmentation and how it can be implemented in your data and in your content and comms strategy
- \* Explore all the media options available for integrated campaigns and communications
- \* Learn to understand the trends and innovation in paid media, content marketing, targeting and profiling
- \* Find out the importance of research to drive effective marketing and campaigns
- \* Explore examples which have led to stand-out campaigns



### Day 3: Effective Content Strategy

Day three targets seriously effective content! The aim of the day is to help in understanding how to engage effectively with your readers. Finding hooks, value add content and practicing some strategies, day three should have you leaving with a more targeted approach to your business' content strategy.

- \* How I position my business to stand out from the crowd using effective content
- \* Uncovering and positioning your point of view and strategic objectives in your communications
- \* A content marketing case study: how to make it happen in 5 easy steps
- \* How content is evolving to drive personalised, powerful client journeys and lead generation
- \* The importance of segmenting your audience and aligning your messaging and content
- \* How to ensure jargon free communications that are fair, clear and not misleading
- \* How to leverage PR and marketing at the strategic level

### Learning outcomes

- \* Understand what content marketing is for, how to use it, and the importance of defining what you are trying to achieve
- \* Learn how to set objectives and measure the effectiveness of your content
- \* Think about what the ingredients are of effective content marketing and what resources you need to deliver
- \* Explore the importance of a client-drive approach to content origination
- \* Discuss how to craft different messages, for the same product, for the needs of different audiences
- \* Explore the effectiveness of client-centric content and empathy versus outward-looking messaging
- \* Understanding the importance of segmentation and how it can be implemented in your data and in your content and comms strategy
- \* Understand the importance of plain simple language to carry your message and explain the "story" of your fund to different types of investors
- \* Gain an understanding of the importance of integrated PR and marketing and their alignment with key business objectives
- \* Explore the key PR levers available through the campaign cycle



## Day 4: Digital Dynamics

Day four focuses on the integration of digital into the marketing strategy. We focus on both looking ahead at the digital journey and how to implement measurable and effective digital activity into your marketing mix.

- \* Digital transformation in the wealth & asset management industry
- \* Building the infrastructure to optimise your digital marketing
- \* How to 'do' digital in your enterprise
- \* Driving agile digital behaviours in your business
- \* Campaign lead generation & customer journeys
- \* Integrating CRM/Email
- \* Building objectives, KPIs and dashboards

## Learning outcomes

- \* Understand current and future digital themes
- \* Explore the core elements of a marketing technology stack
- \* Gain an understanding of the path to selecting and building the stack
- \* Learn how to build out the digital team and take your business on the digital journey
- \* Discuss how to build compelling offers online and x-channel customer journeys
- \* Think about how to segment your CRM and integrate with your email and automation systems
- \* Understand how to build, execute and measure comms plans
- \* Learn to translate objectives into KPIs, gather data to create reports and dashboard and how to report and present data and insight



## Day 5: Leadership in Action

The Fund Marketing Academy is a reward and recognition programme for true talent within our industry. As such, our final day focuses on your leadership development. Alongside developing your marketing skills the FMA aims to develop you by providing mentoring, a network and key skills to showcase your talent. By the end of the final day, you should understand how to manage your key stakeholders from MD to sales, presenting yourself in the boardroom and reflecting on what you want to achieve next.

- \* What are the ingredients of successful leadership, and the expectations of the marketing director and department from the CEO's perspective – from strategy to execution
- \* The evolving and business critical relationship between sales and marketing
- \* Case study examples of effective (and non-effective) C-suite interactions
- \* Leadership training
- \* The dos and don'ts for effective communication with senior management
- \* Understanding your management style & leading a motivated team
- \* The powers of persuasion, influence and effective communication

## Learning outcomes

- \* Find out what it takes to succeed in corporate life, including the importance of delegation and trust
- \* Understanding the role of marketing in corporate strategy
- \* Gain tools and techniques to communicate and present to board members
- \* Discuss what the board needs and what helps them make decisions
- \* Gain an understanding of the dynamics of leadership styles, your own style and your behaviour and interactions affecting others
- \* Explore the different skills and strengths in your team, your own role and how to behave with others

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