



# Four Digital Marketing Trends That Will Help You To Raise Assets

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A Users Guide

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# Introduction

Fund marketing is changing. Thanks to technology, the way firms interact with clients and prospects has altered dramatically. Also, due to the vast amount of information and digital channels out there - what investors want has also changed.

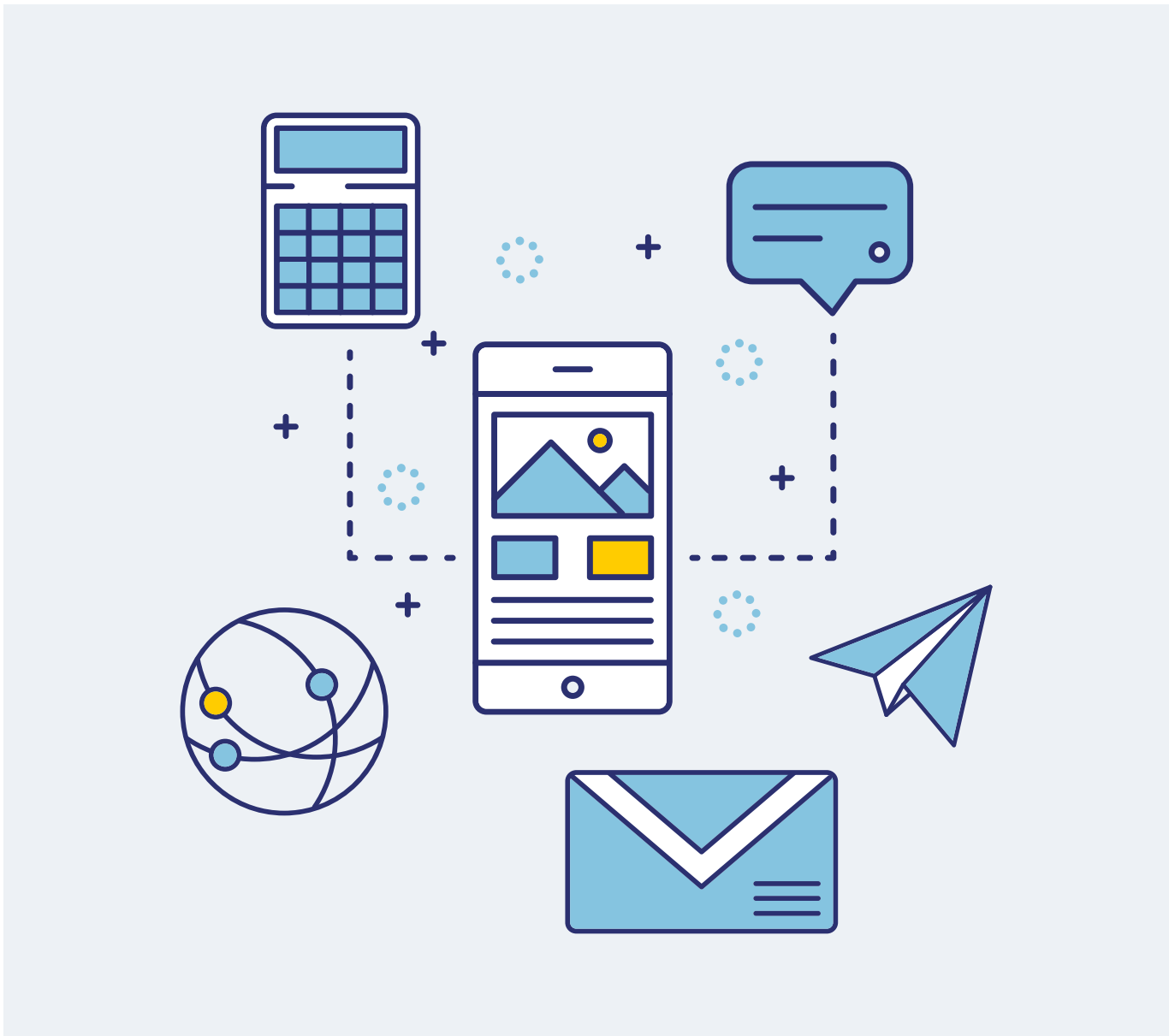
The old days of relationship managers driving investment are disappearing. A new breed of investors – some of whom can't even remember a time before the internet - are taking over.

And these people look to digital sources for advice and to help

them make their own decisions, so are much less likely to rely on what a relationship manager may tell them.

So, in this hyper-connected age, it is those companies that successfully harness digital marketing innovation that will stand out and thrive.

And in this white paper we take a look at four new digital marketing trends that you must get to grips with to master this brave new digital world and grow and retain AuM.



## Integrated Marketing

What does integrated marketing mean? Once, it simply meant ensuring all your print marketing efforts were integrated.

But times change, and integrated marketing today is all about the web experience – and making sure that your website and digital offering provides a truly integrated experience to your clients and prospects.

And this means a modern website that really helps your prospects and clients with what they want to do, as opposed to an 'old-style' website that is full of self-promotional waffle. New, digitally-savvy investors don't want a static website that simply tells them a bit about a company and brand – they want an interactive and useful experience.

So, you need a website that is easy to navigate, with an excellent interface that makes accessing information about, for example, a certain fund quick and easy. And you must have an advanced and simple search capability so investors and prospects can quickly get to where they want to be and find the details they require.

This is what web-users want and need, and are used to in other areas of their lives – so investment should be no different. Intuitive, easily navigated sites like Amazon and John Lewis, which are very good at helping people find what they want quickly and easily, are leading the way in this regard. And people are looking for the same thing from their asset management company.

## Bring in thought leadership

Another trend under the integrated marketing banner is to publish thought leadership articles on a dedicated section of a website, which expand on current topics about funds and investment strategies. These work best when they provide clear help and advice - rather than being promotional - and are written in the voice of the author, rather than in the third person.

Thought leadership articles work for two reasons – one is SEO, as it helps with Google ranking, but the other is that this sort of incisive, helpful and articulate comment is very good at building trust. It's simple human nature that, when you see someone as an authority on a subject, then you are much more likely to trust that person as a provider of the service in question. And this is especially true when it comes to money, where trust is absolutely vital.

## Don't forget about events

It is important to remember that all your online work has one ultimate purpose – to raise and preserve AuM. And, when it comes to AuM, decisions are made offline.

That's why it can be so important to include events, where you can actually meet prospective investors face to face, as part of your integrated marketing strategy.

These are not only great for brand awareness, but also drive ROI and make the most of all your digital marketing efforts. That's because an event allows you to meet the people that you have been connected with digitally and make the final breakthrough in persuading them to invest with you.

## Get social

There is no escaping the importance of social media in your marketing efforts. Whether you're using LinkedIn, Twitter or Facebook – or all three – it can really help you, as your potential client base is there as well.

However, social media content is all too often bland and unengaging and so does little to help with raising AuM. For it to work, you need to inject a bit of personality. One way to do this is to introduce video into your social media marketing, as faces and voices really cut through the blandness of social media content and connect directly with your prospects.

## Bring it all together

The Holy Grail of integrated marketing is to be able to view all your performance statistics – social, web, email etc – in one single place.

This is vital because, if you have this information spread across several different platforms, then it's impossible to demonstrate ROI – and your marketing team will fail to get the recognition it deserves.

By contrast, single platform reporting allows you to drill down into valuable stats on the people within your database – such as who your new prospects are, who is most actively engaged with your material, and (most importantly) which investment opportunities have arisen as a direct result of your marketing activity. This is the type of information that justifies the position of a marketing team and the level of investment it receives.

# AI And Machine Learning

It is easy to get jumpy when AI and machine learning are mentioned. But, don't forget, these are just tools to help you with AuM – they are not going to replace people any time soon

At its most basic level, this new technology allows you to target prospects, and existing investors, within your database who may be ready for a call from your sales department. This could be because digital activity shows they are ready to invest, or they may have been flagged up as they are an existing investor whose behavior suggests they are about to redeem.

So, in this instance AI is there to increase the efficiency of your sales team through the power of rapid digital analysis. It can automatically scour your database to reveal vital information such as:

- Prospects who have just started reading and interacting with your material
- The most active prospects within your database –who are reading and engaging more than any others
- Existing investors who have stopped reading and interacting (and thus may be looking to redeem)
- Existing investors who have suddenly started reading and engaging again (and thus may be ready to increase their investment)

## Teach your AI engine about personas

Client personas are a fantastic marketing tool – as they allow you to identify potential investors from certain characteristics. And you can sit down and identify the typical persona of an investor in your fund and teach your AI engine to spot these people as soon as they enter your system – so marketing and sales teams will be made aware of their presence and can interact with these valuable prospects as appropriate.

## Identify cross-selling opportunities

Perhaps the most powerful - and profitable - ability of your AI engine is to spot cross-selling opportunities. That's because it is far cheaper and easier to sell to people who are already investing with you, than to chase new prospects.

By analysing data, your AI engine can spot those investors who are potentially interested in other funds and products, and alert your sales and marketing teams.

## Make it easy to access

Data doesn't sell - people do, so all the valuable information that is revealed by your AI engine must be brought together in one place that is easily accessible and digestible by your teams.

# Structured Marketing

The days of ad hoc marketing are numbered. Instead, structure is taking over - and getting to grips with this concept is a vital aspect of your digital marketing efforts.

It's no longer good enough - or necessary - to send out mailings, social media posts, or anything else, on an ad hoc basis. Instead, structure has taken over and clever marketers are sending out information in a structured way that can be planned weeks and months in advance. And this information is based around brand values, rather than performance data.

The benefit of concentrating on this is that brand values – unlike

performance - do not change quickly. So, you can deliver a consistent message.

To achieve this switch, you must identify what your company stands for and what your brand represents. And then you need to concentrate your messages around that aspect of your business, as opposed to performance.

And to deliver your messages effectively, you must use a quality project management tool - such as Basecamp, Asana, JIRA etc – that allows you to put all your content and workflow into the system and schedule it all for you.



# ESG

Last, but not least, we come to environmental, social and governance (ESG) and how it applies to marketing.

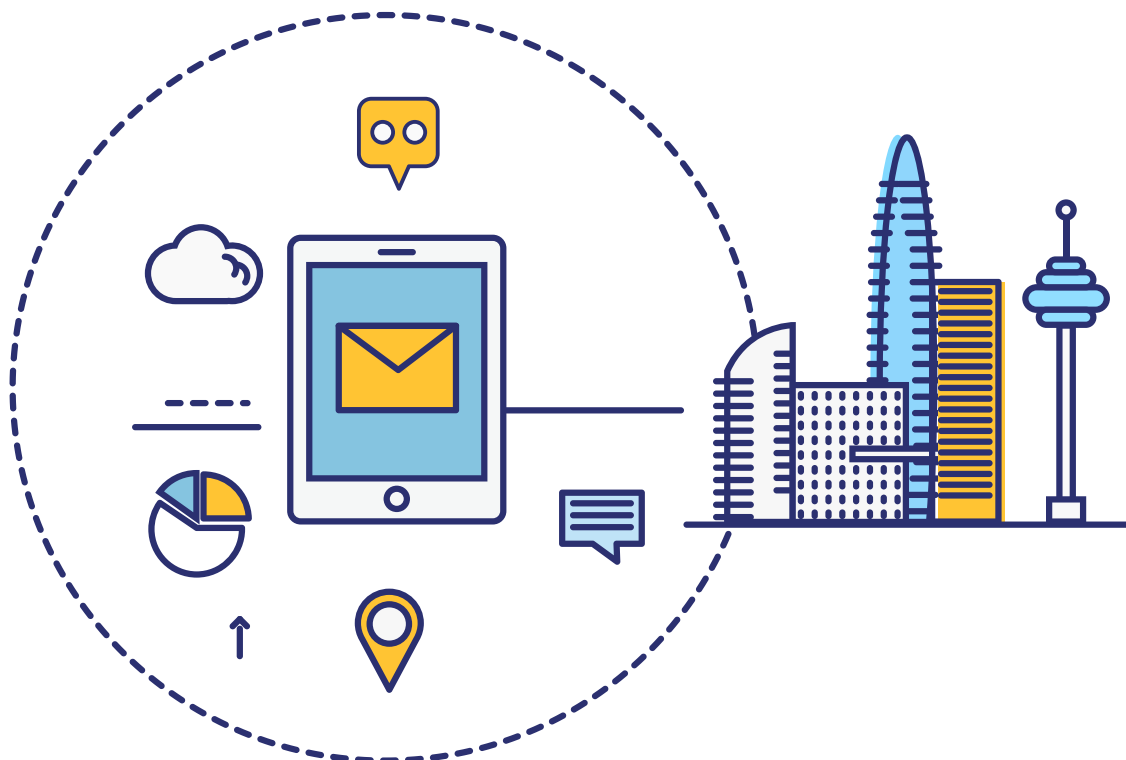
Many overlook ESG, with the reasoning that not every investor is worried about it. True.

But there are plenty of investors who are worried about it – and if your company's corporate behaviour and values are not up to scratch, then they will look elsewhere.

By contrast, no-one is going to refuse to invest with you on the grounds that your ESG is too good.

So, it's important to highlight ESG in your digital marketing and talk up achievements in this regard. But don't pretend that ESG is important to your company if it's not – you will get caught out.

Many firms are now starting separate brands that operate on a higher level when it comes to ESG, which is a trend that is worth considering as it is appealing to many prospective investors.



# Conclusion

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Tech, digital and data is taking over the world. The extraordinary advances in these fields are driving growth in all sectors - and asset management is no exception.

This is so profound and prevalent that the marketers who are really going to succeed - now and in the future - are those that are also effectively data scientists. These are people who understand and act on the fact that good digital marketing is

all about the analytics. So, at the very least, you need someone in your marketing team with a background in data science or mathematics.

And, if you follow the trends described in this white paper and grasp the opportunity represented by this new era of digital marketing, you will raise and preserve more assets.



# Get In Touch



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Clients Aum



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