



# TELL YOUR STORY: 7 TIPS FOR DYNAMIC MESSAGING

# TIP 1

## KNOW YOUR STORY.

### WHO ARE YOU?

Such a simple question really—but are you prepared to answer it? Before you venture out to meet with clients or give interviews, take time to really hone your story.

- Are the facts and history of the firm at your fingertips?
- Can you articulate your philosophy?
- Do you give so many details about your process that no one but another portfolio manager could follow it?

Your story will be memorable if it's translated into relatable, easily digestible language. Even you'll remember it better and tell it more naturally, helping to connect with your audience.

### WHAT MAKES YOU DIFFERENT?

It's critical to identify what sets you apart from your competitors. How is your firm different? Why should someone choose your firm over another? To get started, we've listed a handful of ideas. One or more of these might apply...and of course, we hope other unique characteristics will come to mind.

- Portfolio manager invests in own funds
- Niche expertise
- Family members in the business
- Control of own destiny to hunker down and stay focused on the long term even during financial turmoil
- Pick up the phone when investors call
- Headquartered off-the-beaten path of Wall Street
- Portfolio managers own or have a substantial stake in the firm, so they won't be going anywhere any time soon

- Nimble, able to put money to work and take advantage of market opportunities
- Disciplined and repeatable or unique process that delivers consistent results
- Experienced managers with tenure learned from the past who are better navigate the fund during volatile times
- 4-5 stars or Gold rating from Morningstar, or other recognition
- Interesting asset class or type of fund
- Process for risk management
- Scale of resources
- Low expenses
- Brand/visibility of fund managers
- Available on the major platforms

## Are you all on the same page?

Everyone—from the top executive to the voice that answers the phone—needs to be able to articulate your key messages consistently.



## TIP 2

# KEEP IT SIMPLE

### SHORT, SWEET AND TO THE POINT.

In 1960, the U.S. Navy came up with the acronym KISS (Keep it Simple Stupid). Military personnel saw the value in simple designs. The phrase was coined by an aircraft engineer who wanted average mechanics with average tools to be able to repair planes in the field.

The same principle applies when creating your story and its key messages. Keep your ideas short, sweet and to the point.

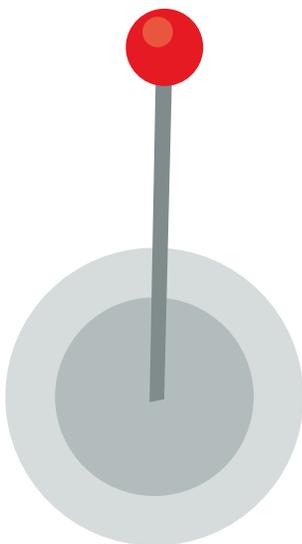
A long meandering tale delving into the jargon-laden nooks and crannies of your algorithms and research prowess is certain to be met with eyes glazing over.

### MAKE AN IMPACT.

Stick to the key points. You'll have more impact if you don't immerse your audience in unnecessary detail.

When articulating your value proposition, your entire firm needs to be on the same page, consistently.

- Know your story
- Keep ideas simple
- Make philosophy and process easy to understand



## TIP 3

# AVOID JARGON

### DON'T ALIENATE AND CONFUSE YOUR AUDIENCE.

Imagine you went to the doctor and were told you were “suffering from a hematoma of tissue in which capillaries had been damaged by trauma allowing blood to extravasate into the surrounding interstitial tissues.” Sounds pretty scary right? In reality, it’s just a bruise.

### HELP INVESTORS UNDERSTAND.

When you’re putting together your story, avoid peppering it with jargon. Of course GARP, P/E, yield curve, duration, and EBITA are important to you, but most of your listeners may not be as conversive.

Fund managers and marketers are smart folks and are used to talking to each other in this kind of shorthand. As you prep for meetings or interviews, think twice about who you are trying to reach, and speak to their comfort zone. Acronyms and jargon can lead to investor confusion and inertia.

Particularly in volatile market conditions, investors want to understand their investments and what their portfolio managers are thinking.

Without that understanding, you can lose their attention – or worse, the sale.



If you must use jargon, pause, then explain it.

# TIP 4

## TELL VS. SELL

### TOO MUCH INFORMATION ISN'T ALWAYS A GOOD THING.

It's easy to tell your story, but you also need to sell... or perhaps do a little of each. But, don't confuse telling a potential investor about your mutual fund with selling it.

**Imagine you're in the market for a new car. The sales person might "tell" you all about the brakes on a particular car, saying:**

*"This car has an anti-lock, anti-skid braking system (ABS). This is an automobile safety system that allows the wheels on a motor vehicle to maintain tractive contact with the road surface according to driver inputs while braking, preventing the wheels from locking up (ceasing rotation) and avoiding uncontrolled skidding. It is an automated system that uses the principles of threshold braking and cadence braking which were practiced by skillful drivers with previous generation braking systems. It does this at a much faster rate and with better control than a driver could manage."*

**Or, the sales person can "sell" on the advantages of the brakes by saying:**

*"This car has ABS, that means an anti-lock braking system. This can be a great advantage in bad weather. In fact, ABS has been proven to stop cars more quickly and with better control on all road conditions.*

*Living here, we're subject to all sorts of messy road conditions and these brakes will help you stop your car no matter the condition."*

Which pitch would you find more enticing? Did you listen to the first pitch or did you doze off?

Before you meet each time with clients or prospects, think about the differences between telling and selling.

# TELL

- Educate
- Get NAME out
- Build brand
- Sound smart

# SELL

- Persuade
- Get STORY out
- Attract investors
- Be consistent



## TIP 5

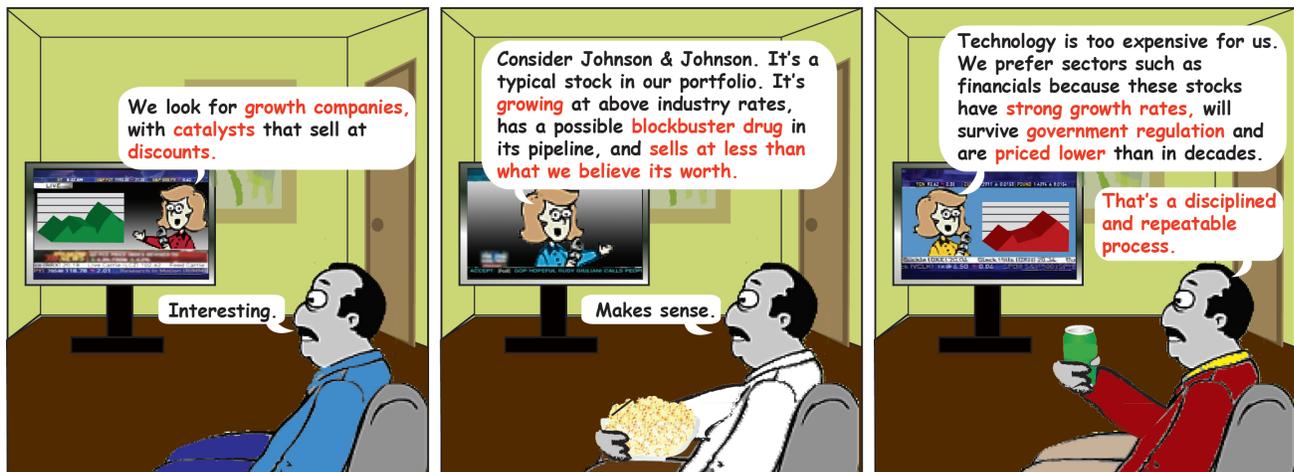
# DISCIPLINED AND REPEATABLE PROCESS

## CONSISTENCY. CONSISTENCY. CONSISTENCY.

Advisors and consultants look for investment strategies that are disciplined and repeatable. Sometimes, to the detriment of a firm's sales and marketing effort, different portfolio managers or even the same one, might not always emphasize the same important points.

Consider this scenario:

### Disciplined, repeatable process



A portfolio manager doesn't have to tell the audience that the firm's process is "disciplined and repeatable." But if he/she talks about the same components of the strategy over and over, the audience will understand the firm's investment strategy and will believe the process is disciplined and repeatable.

# TIP 6

## NUTS & BOLTS

### GO BACK TO THE BASICS.

Part of your story is simply the basics. While the algorithms and analysis that you perform are essential to success, an investor can't buy your fund if they don't have certain core information.

- Ticker
- Morningstar rating
- Lipper rating
- S&P rating
- Performance highlights
- Fund AUM
- Strategy AUM
- Total firm AUM
- Benchmark
- Manager tenure
- Expense ratio
- Share classes
- Minimum investment



Keep everyone on the same page by ensuring they all have quick command of these nuts and bolts.

## TIP 7

# MESSAGE MAP

### BUT HOW ARE YOU MAKING MONEY TODAY?

The financial industry is rarely stagnant, laden instead with ups and downs and uncertainties.

Identifying themes in your portfolio that reflect the current economic environment and ensuring managers, marketing and sales can all speak to them, shows that your whole team is on the same page.



# MESSAGE MAP

## HOW ARE YOU MAKING MONEY?

### STATIC MESSAGES

Goal: \_\_\_\_\_

Name of fund: \_\_\_\_\_

Pains/gains of asset class or fund type: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Investment process: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### EVOLVING MESSAGES

Theme 1: \_\_\_\_\_

\_\_\_\_\_  
*Example 1:* \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Theme 2: \_\_\_\_\_

\_\_\_\_\_  
*Example 2:* \_\_\_\_\_

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\_\_\_\_\_  
\_\_\_\_\_

Story: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

SunStar Strategic provides strategic public relations and inspired marketing communication programs that help you attract, maintain, and grow your clients.

We focus first on developing your unique messages to differentiate your firm in a crowded market. Then we work closely with you to ensure you get the attention and recognition you deserve.

We have a robust PR practice that spans three decades. Our core services include public relations and comprehensive digital and print marketing programs.

## LEARN MORE.

Contact Kathryn Morrison or Hibre Teklemariam at 703.299.8390.

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300 N. Washington St. | Suite 505 | Alexandria VA 22314 | [www.sunstarstrategic.com](http://www.sunstarstrategic.com) | 703.299-8390