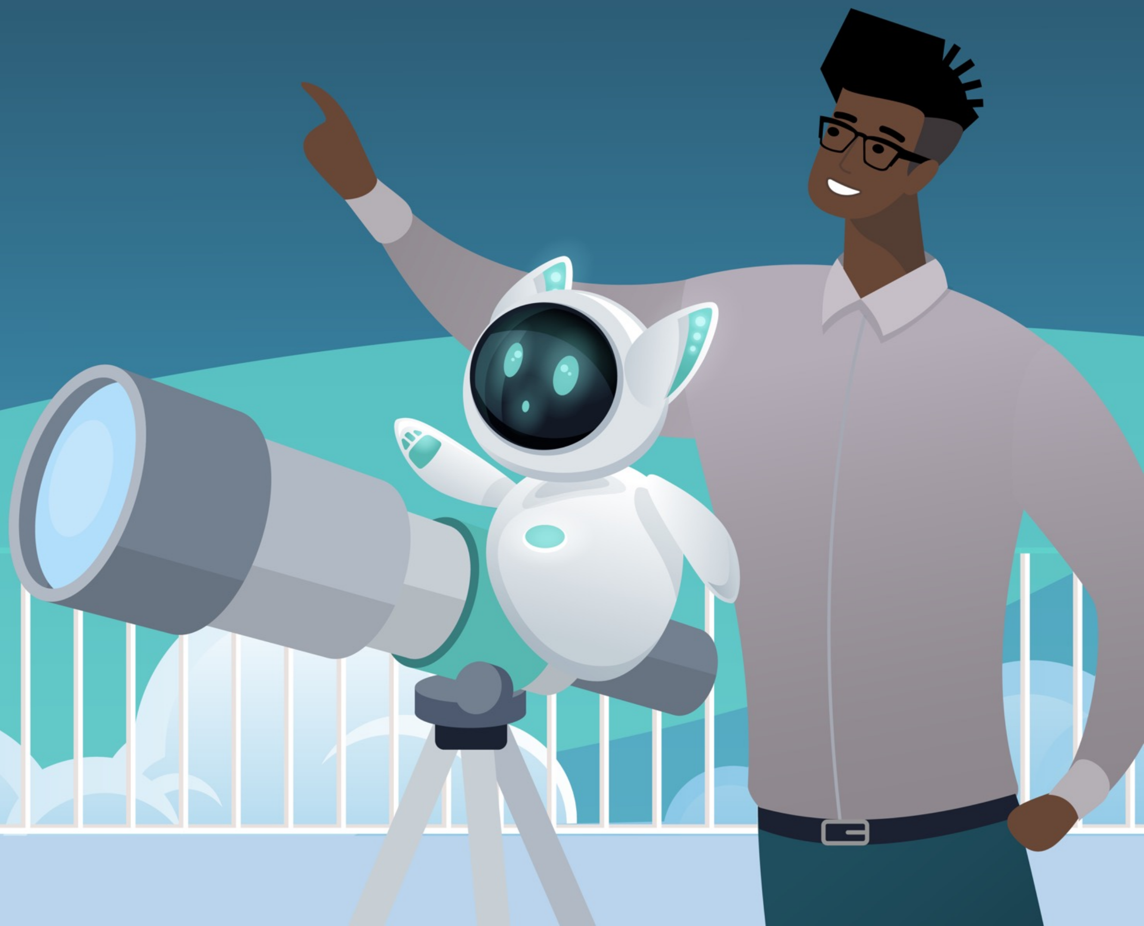
A MODERNIZED APPROACH TO SALES & MARKETING IN

Asset Management

A guide for revenue teams to create and convert more pipeline in Asset Management



Misaligned Sales and Marketing Efforts

Sales and Marketing teams at most asset managers are working towards the same goals but lack the data and tools to properly work together to **focus on growing AUM from institutions and financial advisors**.

Marketing teams run broad-based campaigns targeting companies with firmographic (industry, revenue, etc.) data, whereas relationship managers often focus on predefined account lists set at the beginning of the year.

Both teams are missing out on a huge opportunity to focus both sales and marketing teams on the companies that are actively researching their solutions, but not talking to relationship managers or de-anonymizing themselves through marketing channels (we call this anonymous activity the “dark funnel”).

That’s where **6sense Revenue AI** comes in. In this guide, we’ll show you 3 simple use cases for both marketing and sales, and exactly how they’d work for your firm.

The Traditional Approach No Longer Works

70%
of the client's journey is done anonymously

3%
of website visitors fill out forms

10%
of your targets are in-market to buy

84%
of deals are won by the first firm a client contacts

UNKNOWN DEMAND
Missing Out on **Opportunities**

NOT SUSTAINABLE
Team **Burnout**

POOR TIMING
Falling **Conversation Rates**

LIMITED RESOURCES
Creating **Inefficiency**

Focus Resources on Clients that are Ready to Engage

If we just knew **when clients were In-market (looking for solutions)**, sales and marketing would be so much easier.

When clients are in-market | **Which products they're interested in**

Who to contact | **How to contact them**

6sense pulls together 3rd party internet research (what keywords or topics people are researching on the internet) with data that you already own (website, CRM), and matches it at the company level, to guide you on…

Use Cases

Top 6 Plays for Asset Management

MARKETING

Play #1

Measure and improve marketing efficiency by targeting the right firms

Play #2

Improve engagement by serving up relevant content

Play #3

Target firms while they're considering your competitors

SALES

Play #1

Prioritize prospects who are actively searching for a fund manager

Play #2

Act at the right time on real investor interest with personalized outreach

Play #3

Leverage market insights to cross-sell different investment products to clients

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Play #1: Measure and improve marketing efficiency by targeting the right firms

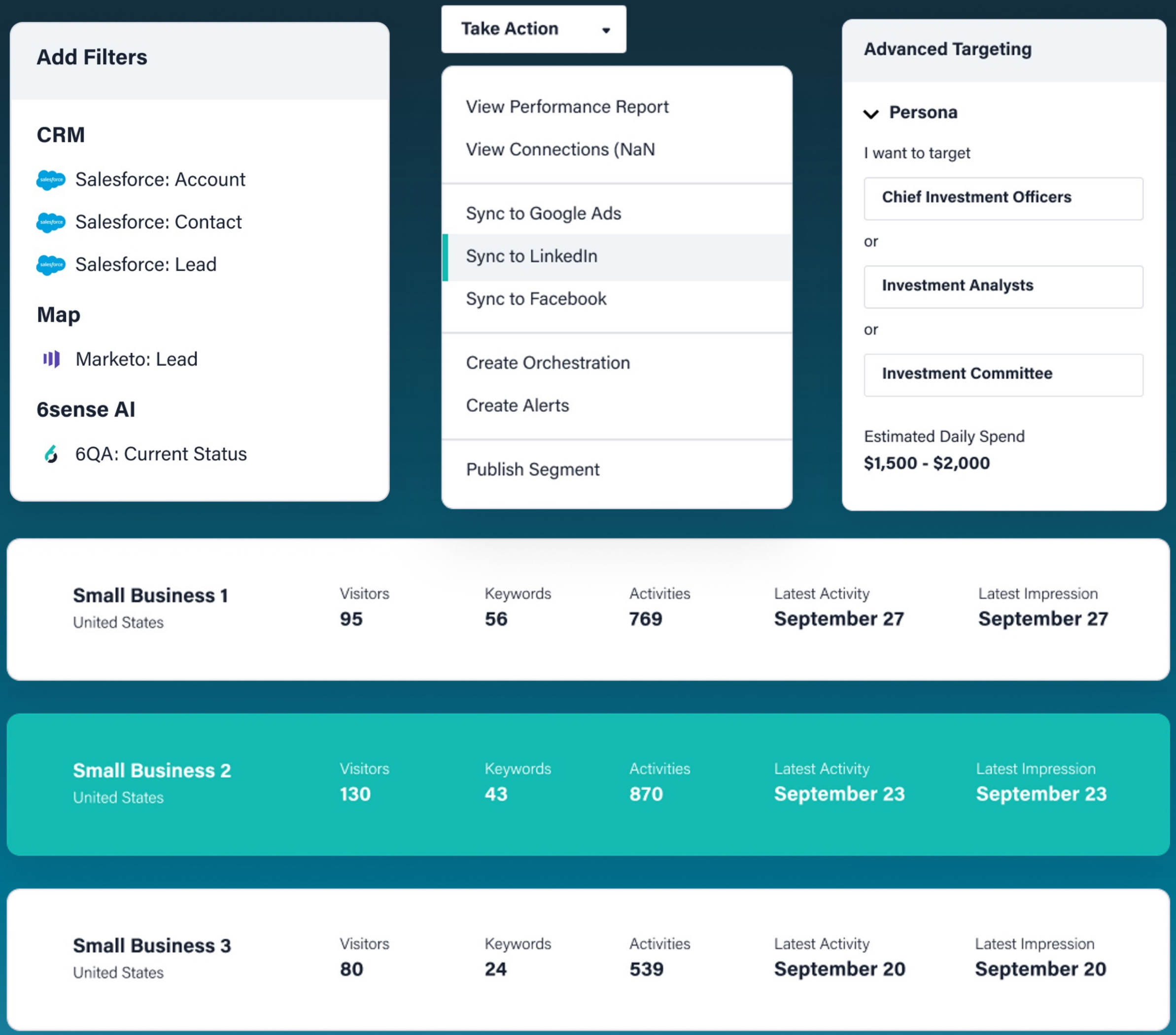
EXAMPLE

Problem: You're launching a new ETF product.

Impact: Previously, marketing campaigns have been broad and generalized with low conversion rates.

Solution: You build a 6sense segment of investors that have been researching passive ETFs.

Result: Only the interested investors hear about this product, and your ROI on dollars spent on the campaign is 2x higher than it would've been.



Play #2: Improve engagement by serving up relevant content

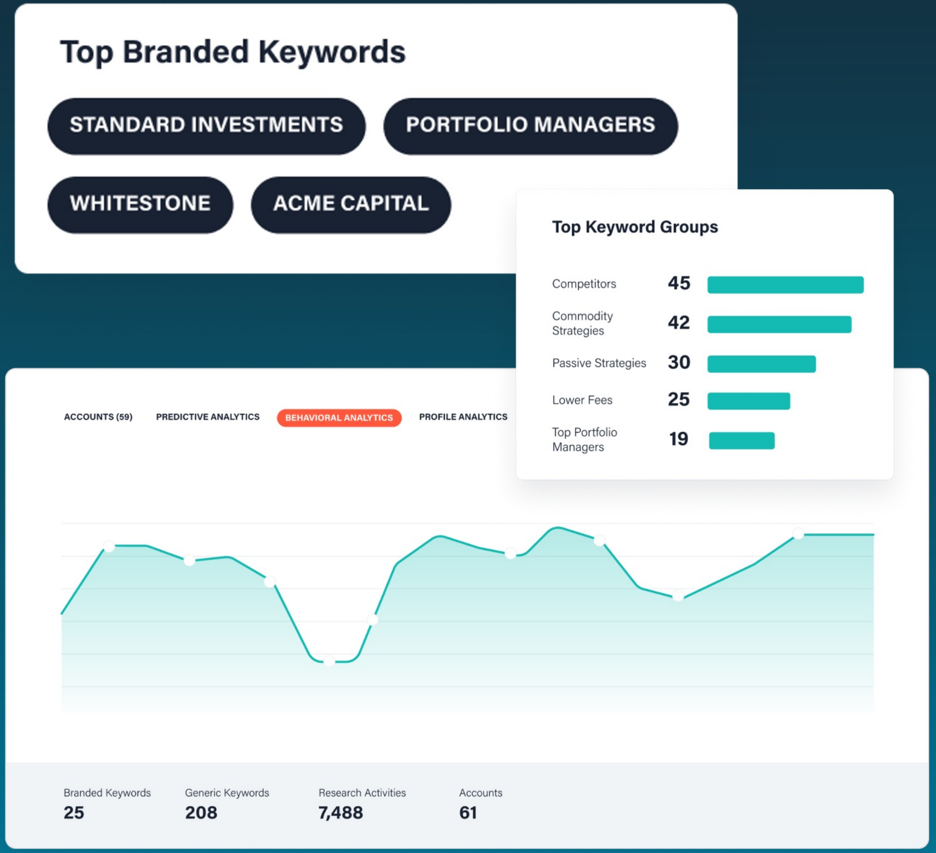
EXAMPLE

Problem: Your firm wants to take a more personalized marketing approach to better engage clients.

Impact: The current marketing outreach is generic with a "spray and pray" outreach technique.

Solution: Set up keywords to track the investment research your prospects are conducting online. Some of the keywords you choose to include are related to investment vehicle (SMA, '40 Act fund, UCITS fund), asset class (investment grade, high yield, emerging markets, real estate), and investor type (retail, institutional).

Result: You use the results to determine which investment products you should market to each prospect, so that your content is always relevant and on-point.



Play #3: Target firms while they're considering your competitors

EXAMPLE

Problem: A family office is researching products and specifically looking at tax-exempt muni funds.

Impact: The family office is researching competitors' products online. Your firm offers a competing product with a strong track record.

Solution: You add the company to an awareness campaign with educational materials that highlight your firm's expertise in the asset class and tax-exempt muni funds they might be interested in.

Result: The family office engages with your campaign and your product is now in their consideration.

Top Branded Keywords

STANDARD INVESTMENTS
PORTFOLIO MANAGERS
WHITESTONE
ACME CAPITAL

Play #1: Prioritize prospects who are actively searching for a fund manager

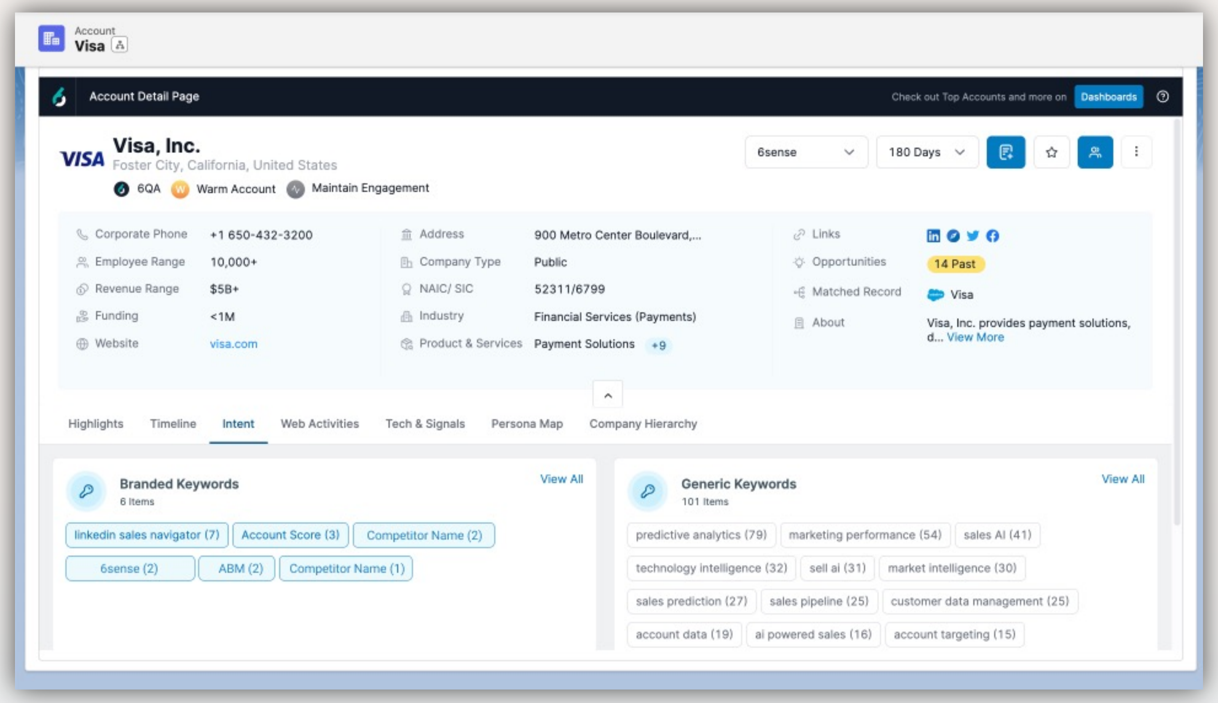
EXAMPLE

Problem: You're an internal wholesaler covering a large region in the country.

Impact: Due to the large territory, it's not realistic to manually determine which accounts are ready for outreach.

Solution: Your dashboard view within your CRM has been configured to prioritize prospects that are in-market based on recent activities such as website visits, companies and keywords researched, and more.

Result: Guesswork is removed from determining which prospects you should engage with now and sets you up for a more productive day of outreach.



Account details page, embedded within your CRM, display relevant account information, like intent keywords researched and which web pages are being visited, where your sellers already work.

Play #2: Act at the right time on real investor interest with personalized outreach

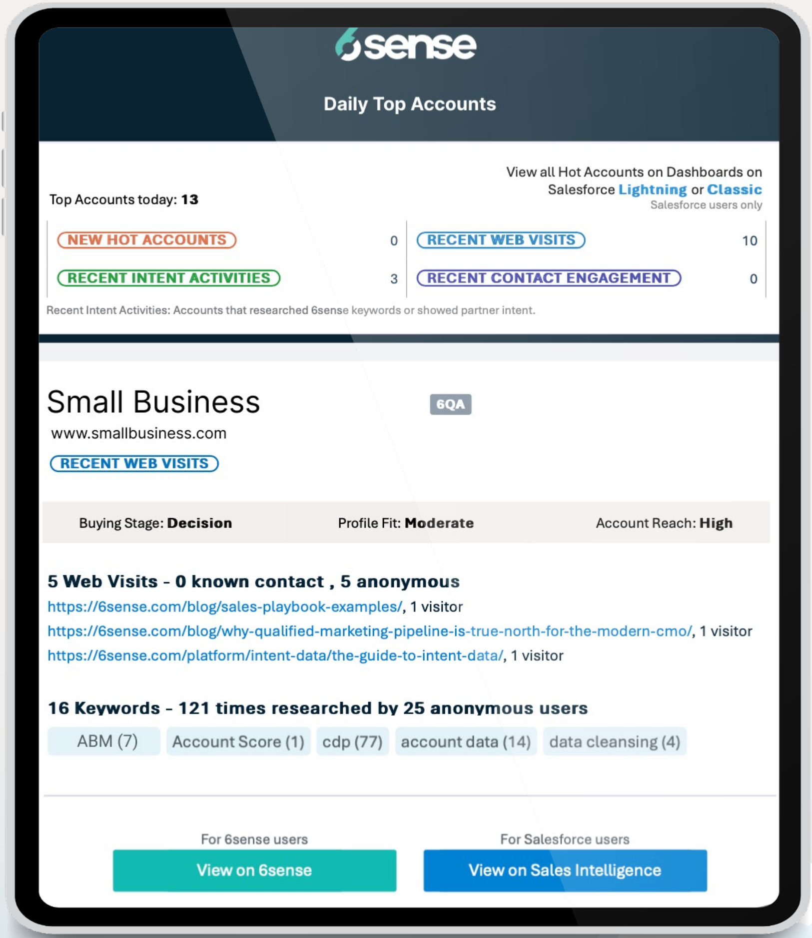
EXAMPLE

Problem: An RIA you've been prospecting for years appears to be searching for a new ESG fund.

Impact: The RIA hasn't reached out to your firm directly.

Solution: You've configured real-time email alerts to notify you when your prospects show increased intent or relevant activity. In the past week, the RIA has been researching ESG and investment managers with ESG offerings.

Result: You email your contact there to share your firm's most recent ESG thought leadership piece and ask if they would like to schedule time to discuss your firm's ESG-focused ETFs and mutual funds. The contact books a meeting thanks to your relevant and timely outreach.



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Play #3: Leverage market insights to cross-sell different investment products to existing clients

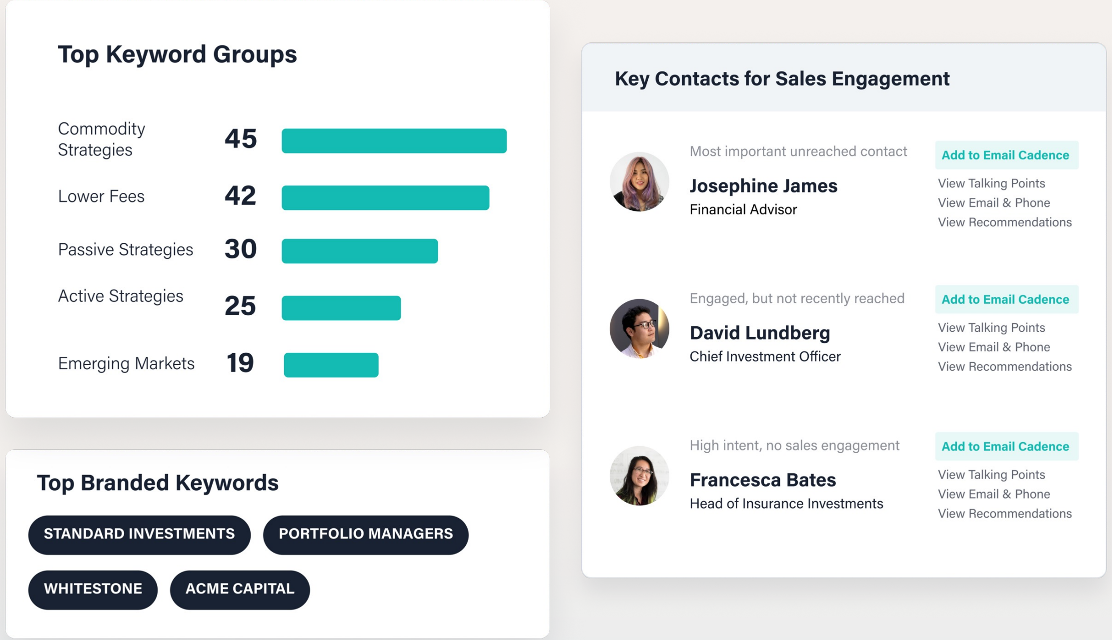
EXAMPLE

Problem: A large client has a US IG Credit mandate with your firm. They're unhappy with their other manager who manages their equity portfolio and are looking for a replacement.

Impact: It's been a while since their last investment review, so they haven't shared this information with you yet.

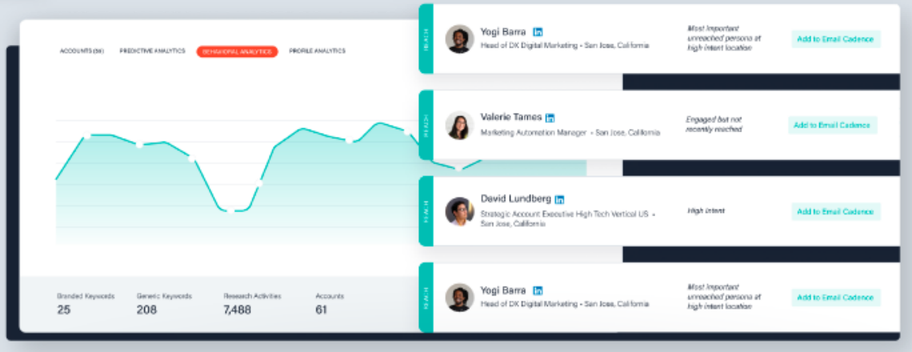
Solution: You see from 6sense keyword research that they've been researching other equity managers online and schedule a check-in with them.

Result: During the check-in, you're able to proactively discuss your firm's equity offerings and capabilities before competitors.



ACTIVATION LAYER

Revenue AI™ for Marketing



Revenue AI™ for Sales

INTELLIGENCE LAYER

WHO
Anonymous Buyer Intelligence

WHEN
Predictive Intelligence

HOW
Recommendation Intelligence

WHAT
Generative Intelligence

Data Cleansing & Connecting

DATA LAYER

- Web Activity
- Company
- Intent
- People
- Pre-Intent

CRM

MAP

Join the suite of asset management and other financial services firms using 6sense to drive quality AUM.

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SEI New ways. New answers.®

DFIN

experian.

ENVESTNET®

GEOWEALTH

Continue your learnings here.

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+39%
More Opportunities

+13%
More Wins

+45%
Larger Deals

-38%
Shorter Cycles

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