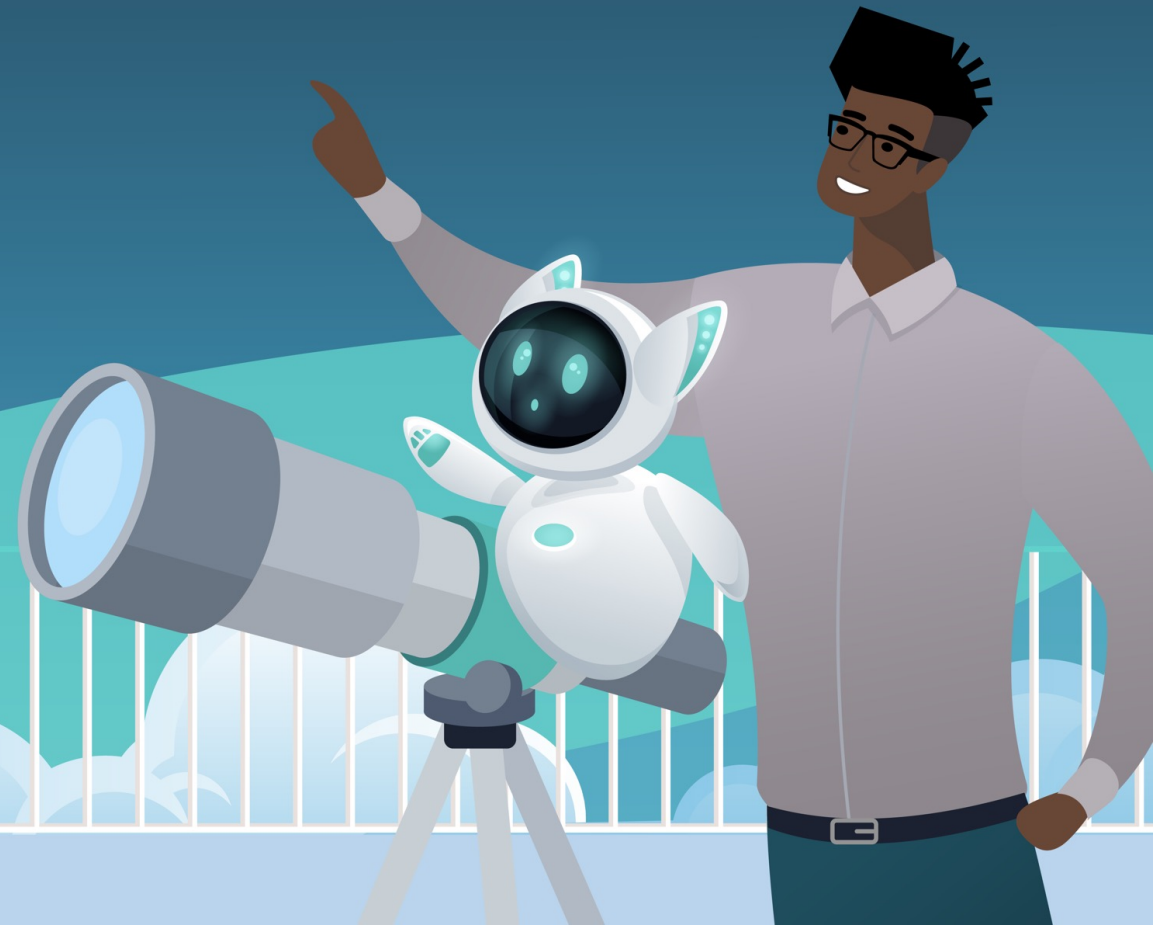




A MODERNIZED APPROACH TO SALES & MARKETING IN

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



- Total In-market Clients
- Known In-market Clients

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

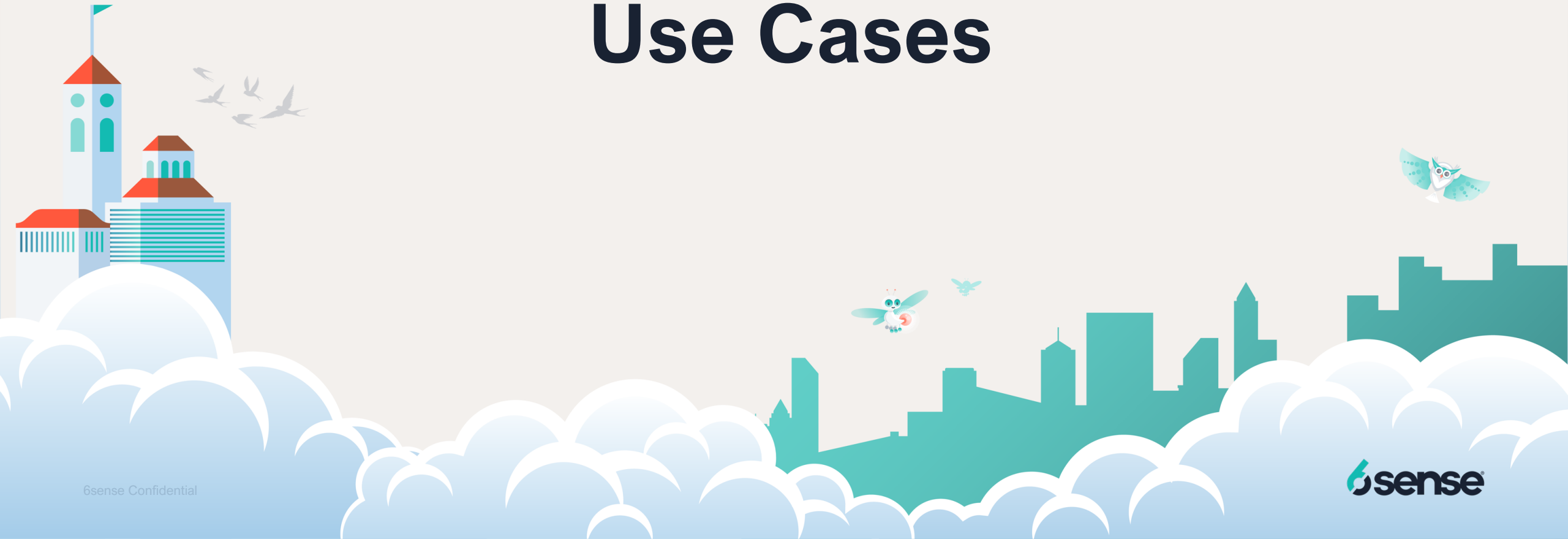
Which products
they're interested in

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

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.

Add Filters

CRM

- Salesforce: Account
- Salesforce: Contact
- Salesforce: Lead

Map

- Marketo: Lead

6sense AI

- 6QA: Current Status

Take Action

- View Performance Report
- View Connections (NaN)
- Sync to Google Ads
- Sync to LinkedIn**
- Sync to Facebook
- Create Orchestration
- Create Alerts
- Publish Segment

Advanced Targeting

Persona

I want to target

- Chief Investment Officers

or

- Investment Analysts

or

- Investment Committee

Estimated Daily Spend
\$1,500 - \$2,000

Small Business 1	Visitors	Keywords	Activities	Latest Activity	Latest Impression
United States	95	56	769	September 27	September 27
Small Business 2	130	43	870	September 23	September 23
United States	80	24	539	September 20	September 20

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.



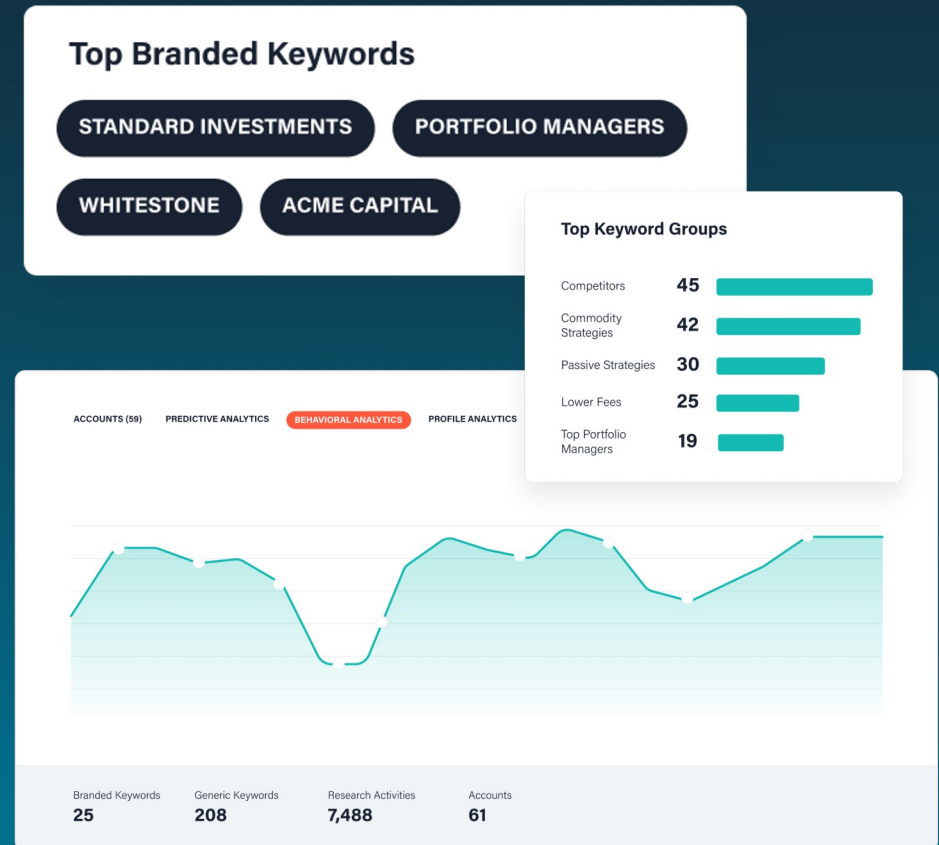
Impact: The current marketing outreach is generic with a “spray and pray” outreach technique.



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.

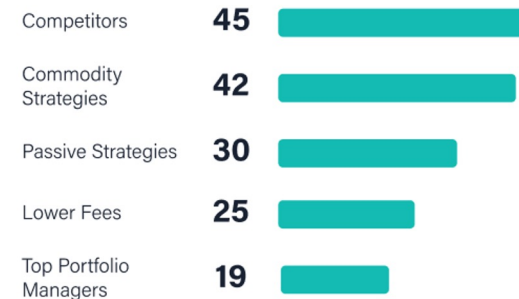


Solution: You add the company to an awareness campaign with educational materials that highlight your firm's expertise in the asset class and tax-exempt muni funds they might be interested in.



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

Top Keyword Groups



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.

The screenshot shows the 'Account Detail Page' for Visa, Inc. in a CRM system. The account is located in Foster City, California, United States, and is classified as a 'Warm Account' with a '6QA' rating. Key information includes: Corporate Phone (+1 650-432-3200), Employee Range (10,000+), Revenue Range (\$5B+), and Website (visa.com). The page also displays social media links, opportunities (14 Past), and a 'Matched Record' for Visa. Below this, there are tabs for 'Highlights', 'Timeline', 'Intent', 'Web Activities', 'Tech & Signals', 'Persona Map', and 'Company Hierarchy'. The 'Intent' tab is active, showing 'Branded Keywords' (6 items) and 'Generic Keywords' (101 items). Branded keywords include 'linkedin sales navigator (7)', 'Account Score (3)', and 'Competitor Name (2)'. Generic keywords include 'predictive analytics (79)', 'marketing performance (54)', 'sales AI (41)', 'technology intelligence (32)', 'sell ai (31)', 'market intelligence (30)', 'sales prediction (27)', 'sales pipeline (25)', 'customer data management (25)', 'account data (19)', 'ai powered sales (16)', and 'account targeting (15)'.

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.

The screenshot displays the 6sense dashboard for 'Daily Top Accounts'. It shows a summary of top accounts today (13) and a table of key metrics:

Metric	Value
NEW HOT ACCOUNTS	0
RECENT INTENT ACTIVITIES	3
RECENT WEB VISITS	10
RECENT CONTACT ENGAGEMENT	0

Below the summary, the dashboard details an account named 'Small Business' (www.smallbusiness.com) with a 'BQA' tag. Key attributes include: Buying Stage: **Decision**, Profile Fit: **Moderate**, and Account Reach: **High**.

The account has 5 Web Visits (0 known contact, 5 anonymous) from the following URLs:

- <https://6sense.com/blog/sales-playbook-examples/>, 1 visitor
- <https://6sense.com/blog/why-qualified-marketing-pipeline-is-true-north-for-the-modern-cmo/>, 1 visitor
- <https://6sense.com/platform/intent-data/the-guide-to-intent-data/>, 1 visitor

The account is also associated with 16 Keywords, researched 121 times by 25 anonymous users. The keywords are: ABM (7), Account Score (1), cdp (77), account data (14), and data cleansing (4).

At the bottom, there are two buttons: 'View on 6sense' (for 6sense users) and 'View on Sales Intelligence' (for Salesforce users).

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.

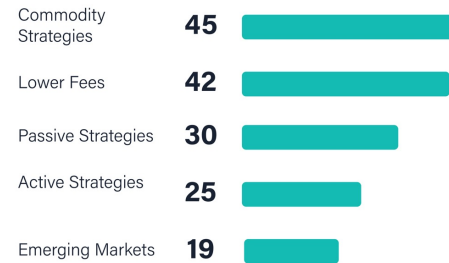


Solution: You see from 6sense keyword research that they've been researching other equity managers online and schedule a check-in with them.



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

Top Keyword Groups



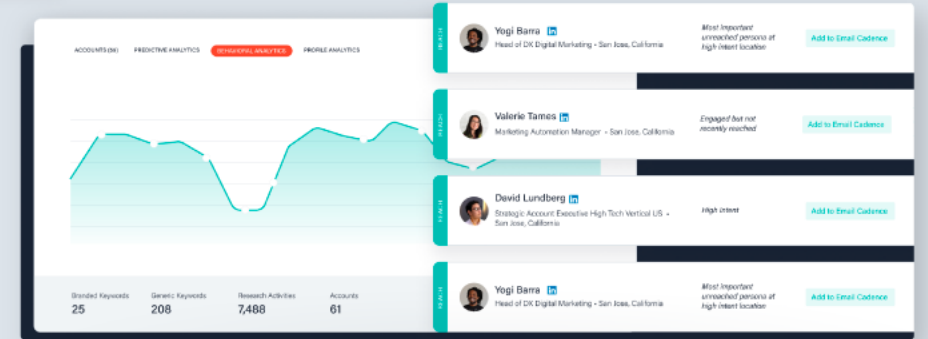
Top Branded Keywords



Key Contacts for Sales Engagement

	Most important unreachable contact Josephine James Financial Advisor	Add to Email Cadence View Talking Points View Email & Phone View Recommendations
	Engaged, but not recently reached David Lundberg Chief Investment Officer	Add to Email Cadence View Talking Points View Email & Phone View Recommendations
	High intent, no sales engagement Francesca Bates Head of Insurance Investments	Add to Email Cadence View Talking Points View Email & Phone View Recommendations

ACTIVATION LAYER



Revenue AI™ for Marketing

Revenue AI™ for Sales

INTELLIGENCE LAYER



WHO

Anonymous Buyer Intelligence



WHEN

Predictive Intelligence



Data Cleansing & Connecting



HOW

Recommendation Intelligence



WHAT

Generative Intelligence

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.

  SEI New ways.
New answers.®

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+39%
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Opportunities

+13%
More Wins

+45%
Larger Deals

-38%
Shorter Cycles

 6sense®