

Fundraising, investor relations and marketing

May 2019, 2 min read

The most overlooked aspect of marketing for asset managers

Authors: Kyle Dunn

The most overlooked aspect of marketing for asset managers – building and communicating to an audience on a consistent basis.

I can feel the disappointment. You were hoping for a marketing nugget that could bump up AUM with little effort. Sorry, those don't exist.

Yes, it is obvious... then why don't people make the effort to do a better job at it?

Maybe this will drive the point home. You know all the people you have talked to over the last three months? Well, it's very likely that you are going to want to talk to them again at some point. Best capture those names and relationships in a form that allows you to efficiently and consistently re-connect. This is the only way you can truly leverage relationships – leverage being the key word. There is a difference between having relationships and leveraging relationships.

“We don't want to talk to people en masse”

“We don't want to look like we're trying too hard.”

Whatever the excuse, we have heard it, and you are wrong. Every time you run into someone, get the name into a CRM system and categorize the relationship. It's simple but in terms of marketing, for this industry, there really is nothing more important.

Tags: asset management , CRM , CRM system , marketing , mjHUDSON-MEYLER