



**3PM**

THIRD PARTY MARKETERS ASSOCIATION

# The New Sales

**10.06.20**

**10AM EST**

# Business Operations

**10.13.20**

**10AM EST**

# Dynamic Marketing

**10.20.20**

**10AM EST**

# Global Allocators

**10.27.20**

**10AM EST**

**3PM MEMBER FIRESIDE CHAT**

**11.03.20 @ 3PM EST**



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# Dynamic Marketing

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# Dynamic Marketing Should Focus on Content

- Martin Lucas, CEO of Gap In the Matrix, has stated that digital advertising has a **98.81% failure rate**. Based on the amount of money that is spent on digital advertising, that means that \$265 billion is wasted on digital advertising every year.<sup>(1)</sup>
- Hubspot also said "These trends tell an important story. **Email prospecting, to put it bluntly, is out of control**. It's easy to send thousands of emails with just a few clicks, and in a chaotic time, we understand why sales teams are sending so many. But volume and quality is a tradeoff — **the time a team saves by sending out email blasts is wasted if that outreach isn't personalized, relevant, and helpful**. These gaps are clear in the data."<sup>(2)</sup>
- [Michael Brenner](#) in a recent article, "That's why B2B businesses need to take advantage of the online digital "space" through [content marketing](#). The top three content marketing priorities identified by B2B marketers, according to the Content Marketing Institute are:
  - *creating more engaging content (72%)*
  - *gaining a better understanding of what content is effective (65%)*
  - *finding better ways to repurpose content (57%)*
  - *"[Content Marketing ROI is 7 times greater than paid ads.](#)"<sup>(3)</sup>*



# How Do You Deliver Dynamic Marketing?

- **What is your goal?** Drive traffic to your website? Drive downloads? Create leads?
- **Who is the audience?** How are you delivering to them? Do you currently have access to them, or do you need to pay for distribution?
- **What is the story you want to tell?** Is it time-specific, or evergreen?
- **What media should you use to tell it?** Think about covering different angles in different formats.
- **Has it gone everywhere?** Website? Social media? Newsletters or client emails?
- **Measure, measure, measure!**

# Dynamic Marketing Case Study: Digital Takeover

*IRIS.xyz home page banner ads / four articles / one podcast / one lead generation email*

Placement	Week 1	Week 2	Week 3	Week 4	Week 5
IRIS.xyz Home Page <i>12,000 views/day</i>	Banner Ads Article 1	Banner Ads Article 2	Banner Ads Article 3 Podcast	Banner Ads Article 4	
IRIS Newsletter* <i>15,000 opt-in subscribers 15% open rate; 20% click rate *Publishing day + weekend</i>	Article 1	Article 2	Article 3	Article 4	
IRIS Social Media LinkedIn Facebook Twitter <i>20,000 followers</i>	Article 1	Article 2	Article 3 Podcast	Article 4	
Outbound Email <i>Up to 275,000 recipients</i>					Podcast Article 1,2,3,4

**GOAL:** Create an overall branding experience to raise awareness, build credibility, and generate leads through multimedia content development and distribution.



# Dynamic Marketing Case Study: Digital Takeover

*IRIS.xyz home page banner ads / four articles / one podcast / one lead generation email*

## RESULTS:

- Five weeks of consistent, continuous exposure across IRIS.xyz
- Leads from email: 524
- Podcast downloads: 3,127
- Page Views: 372,800
  - IRIS.xyz Home Page Views (for ads & articles) – 360,000
  - Average article page views: 3,200 each
- Newsletter Impressions: 11,250
- Social Media Impressions: 100,000

**GOAL:** Create an overall branding experience to raise awareness, build credibility, and generate leads through multimedia content development and distribution.

# Podcasts and Videos Continue to Grow in Popularity

- Podcast listenership dropped suddenly at the start of the Coronavirus outbreak as people's commutes disappeared <sup>(1)</sup>
- Listenership has rebounded - **downloads have grown 17% since April**, and 20.6% year-to-date <sup>(2)</sup>
- iHeart Radio found that more people were listening to **more business and finance podcasts** – downloads & streams for those categories were up 78% <sup>(3)</sup>
- YouTube saw a **75% increase in people watching videos** from “authoritative” sources during the pandemic outbreak (legitimate news agencies, government agencies, health authorities) <sup>(4)</sup>
- Video currently accounts for **63% of mobile device traffic** <sup>(5)</sup>



# Sources

Website: [www.iris.xyz](http://www.iris.xyz)  
LinkedIn: @iris-xyz  
Twitter: @iris.xyz  
Facebook: @irisdotxyz

Slide #2

- (1) Lucas, Hughes, (October 19, 2020). What Can We Do to Prepare for the World in 2021 with Martin Lucas. Retrieved from <https://www.youtube.com/watch?v=hFYVWWCXs4Q>
- (2) Bodnar, Hubspot Blog, (July 7, 2020). A Look Back at How COVID-19 Impacted Businesses in Q2. Retrieved from <https://blog.hubspot.com/marketing/covid-19-benchmark-data-retro1>
- (3) Bremer (May 11, 2020). YWhat is Content Marketing, Really? (And Other Content Questions Answered). Retrieved from <https://marketinginsidergroup.com/content-marketing/what-is-content-marketing/>
- (4) Hughes, (September 1, 2020). Content Pyramid. Sourced from: <https://dlaignite.com>

Slide #6

- (1), (2) Hayes, Kali (August 7, 2020). Podcast Listening Starts Steady Comeback After Early Pandemic Slowdown. Retrieved from <https://wwd.com/business-news/media/podcast-listening-trends-news-coronavirus-digital-media-habits-1203696091/>
- (3) I Heart Radio (March 31, 2020). New iHeart Radio Podcast Insights Show Increase in Listening as More Americans Quarantine During the COVID-19 Pandemic. Retrieved from <https://www.iheartmedia.com/press/new-iheartpodcast-insights-show-increase-listening-more-americans-quarantine-during-covid-19>
- (4) Nieva, Richard (April 22, 2020). YouTube says 'authoritative' news viewership has jumped amid pandemic. Retrieved from <https://www.cnet.com/news/youtube-says-authoritative-news-viewership-has-jumped-amid-covid-19-pandemic/>
- (5) Chaffey, Dave (September 1, 2020). Mobile marketing statistics compilation. Sourced from: <https://www.smartinsights.com/mobile-marketing/mobile-marketing-analytics/mobile-marketing-statistics/>

# LinkedIn Marketing

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# 10 Actionable Tips for Asset Managers to Use LinkedIn Better

- **86% of institutional investors** said they look at a company or executive's social media channels when evaluating current or prospective investments with them, according to Edelman 2018 Many of them comment, like or share. Some will email or call you directly
- **50% of financial advisors** said they're using LinkedIn more often than they were a year ago, and that will continue to rise, according to Greenwich Associates in 2020.
- Engagement on American Century's social media was roughly **triple the level of last year.**
- Traffic coming to Putnam's website coming from social media platforms has **quadrupled in the past two years.**
- **74% of US financial advisors** surveyed who used social media for business during the pandemic reported that they initiated new relationships or onboarded new clients as a result, according to Putnam's Social Advisor study.
- **50% of advisors** use direct messaging on LinkedIn, with **92% gaining assets**, according to Putnam's Social Advisor study.
- Year-to-date, adviser registrations driven by Putnam's social media platform are **up 147% compared to last year**, according to the Putnam Social Advisor study.

# GOALS

For Using LinkedIn

## GET NAME OUT

Get your name and message out to your target audience

## EXPECTATIONS

Investors expect asset managers to be on LinkedIn

## 2<sup>nd</sup> CHANNEL

Add an additional channel to engage beyond phone and email

## ATTRACT LEADS

Attract and nurture leads and clients

## PERSONAL USE

Salespeople can better target and research prospects

## INTEGRATION

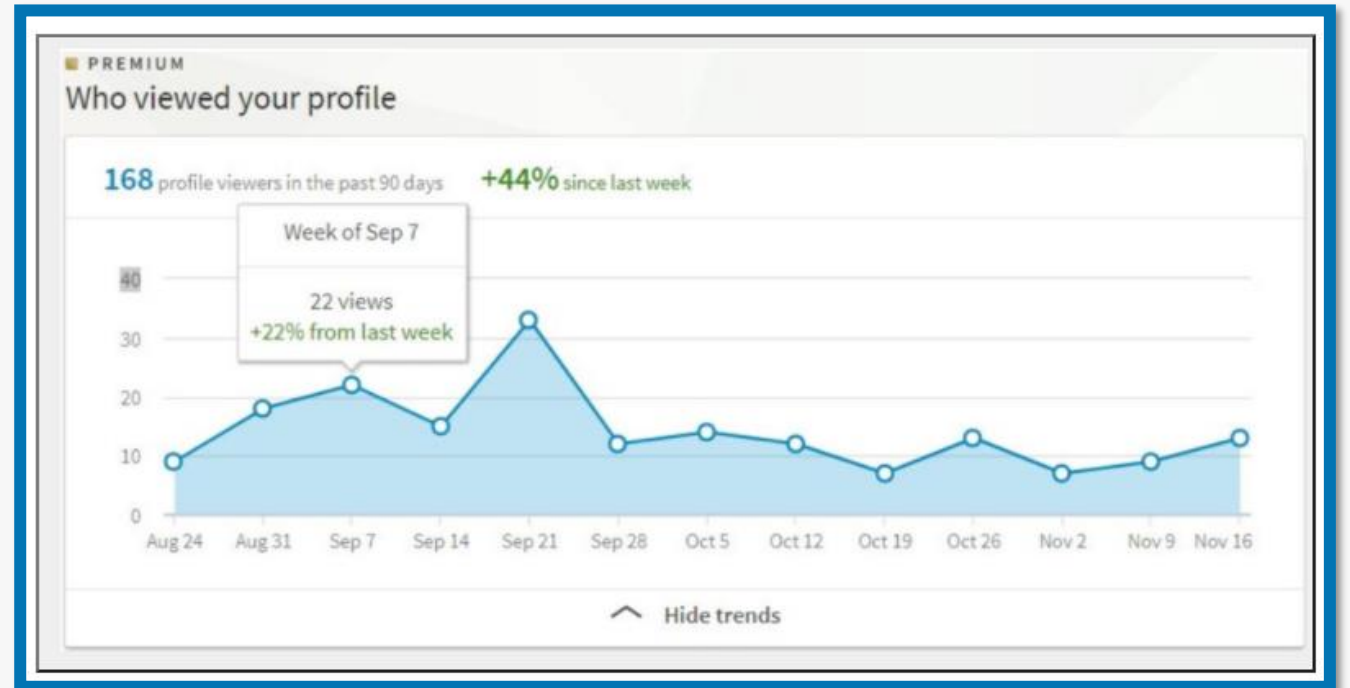
Incorporate analytics with CRM and marketing automation



# LinkedIn Free vs Premium

## LinkedIn Premium

- InMail
- Who's viewed your profile
- Competitor insight
- Sales Navigator



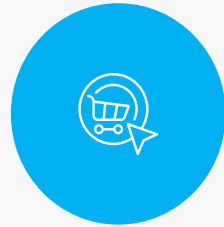
# Strategic Considerations

For LinkedIn



## FACES

Selection of executives to be public faces as well as corporate profile.



## CUSTOMIZATION

Customized messages for different audiences.



## CONTENT PLANS

Editorial calendar showing timing and topics for content.



## ANALYTICS

Engagement levels of clients and prospects and integration with other digital strategies.



## SPEED

Putnam's Rapid Approval process.



## MULTILAYERED

Give your sales teams, advisors preapproved content to use with their clients and prospect.



## SPONSORSHIP

Sponsored content to segment and target.



## EMPLOYEE BUYIN

Training or coaching to help employees get comfortable with LinkedIn.

# Content Strategy using LinkedIn

- Enhance profiles with: photos, thought leadership, contact information--integration with website and blog
- Market commentaries, investment strategy, white papers
- Weekly or monthly insights (blog)
- Videos, infographics, images, Gif's, charts and graphs
- Putnam's "10 Minute Daily Challenge" was created to help advisers leverage LinkedIn for building business and strengthening client relationships during the pandemic



# 10 Actionable Tips for Asset Managers to Use LinkedIn Better







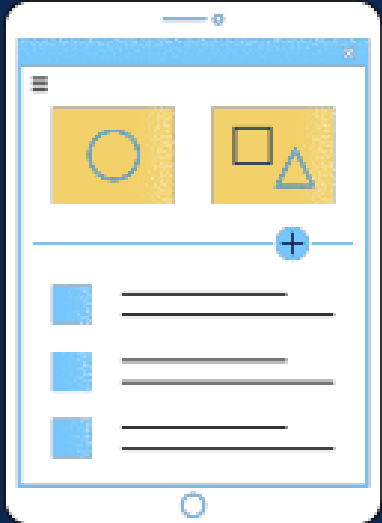
# Dynamic Marketing: Database & RFP Best Practices

Patricia Sandoz, Founder & President  
Investment Management Support Solutions, LLC



# Consultant Database Evolution

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- A reduction in consultant databases over the last 10+ years due to Mergers/Acquisitions.
- As number of managers continue to grow, the number of consultants' have declined.
- Harder to get in front of key individuals – databases can put you on the radar.
- Many consulting firms have moved away from internal proprietary databases.
- Major “top tier” databases are being sourced for manager data/analytics/peer comparisons.
- Relationships matter; build your network and “stay in touch”.

# Common Scenarios

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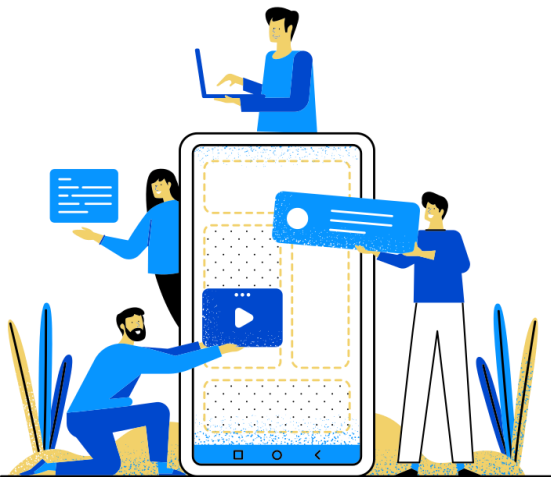
80% of managers are unaware:

- That their databases are incomplete, and the lack of reporting being done.
  - What databases they are reporting to, what information and frequency.
  - What strategies/vehicles are in the databases.
- 
- Our experience shows over 50% of managers have average “fill” rates below 65% across multiple databases.
  - Have an inexperienced individual(s) filling out the databases who is unfamiliar with the depth of the systems and reporting requirements.
  - Managers may not know what will initiate an “inactive” or “universe declassification” leaving them out of searches and are unaware it even happened.

# Best Practices

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- Be familiar with the data & document requirements and frequency of reporting for each database.
- Meet deadlines for data submission – your data release can be delayed up to a month if missed.
- Data accuracy starts internally – conduct checks and balances prior to reporting.
- Complete and up to date information is key to screening into searches.
- Consistency is critical across all areas of database reporting, RFP's, pitchbooks, websites, etc..
- Conduct database quarterly reviews – new sections are added/updated at varying intervals.
- Databases and RFP's go hand in hand – RFP's may reference a specified database they are sourcing.
- Read the instructions – RFP's have a list of requirements to qualify and specifics for completion, take time to understand all of them before delegating resources to complete them.
- Nuances, Nooks & Crannies – Big timesavers & items that can save you from doing things twice!





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