

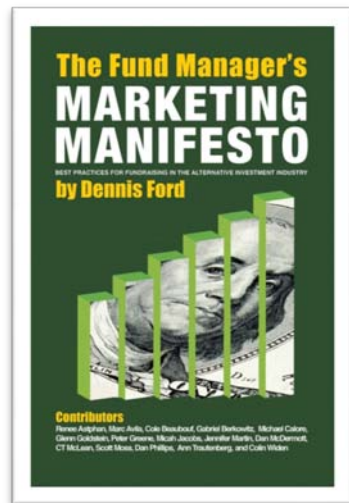
Creating Effective Email Marketing Campaigns

Webinar Presented by

Dan McDermott

Founder—Brighton House Associates

Contributing Author—The Fund Manager's Marketing Manifesto



The Fund Manager's Marketing Manifesto

Best Practices for Fundraising in the Alternative Investment Industry

Agenda

- Developing Your Message
- Profile your Target Investors
- Source and Compile Your Investor Target List
- Executing Your Email Campaign
- Examples of Email Formats
- Increasing Your “Hit Rate”

Developing Your Message

- Minimum annual marketing expense: \$75K-100K
 - Excluding cost of a marketing staff
- Highlight firm's distinct value
- Identify your "hook"
 - Hook: 8-12 words that get to foundation of your firm's value to investors
 - BHA hook: *"Connecting Fund Managers With Investors"*
- Create an elevator pitch
 - BHA elevator pitch: *"Through one-one one interviews, BHA collects investor's fund strategy preferences, fund manager requirements and allocation timelines. Fund managers drastically improve their marketing efforts because BHA knows where the money is."*

Define Your Investor Targets

- “Hit Rate” determined by whether investor is looking for your fund
- Target investors based on your size and strategy
 - Categories of investors
 - Tailored email to investor interests gets higher response rate
- Outreach: broad versus targeted
 - Targeted—leads to higher results from a smaller group
 - Broad—captures a few “outliers” that were not identified
 - BHA sales example-California trip
 - Created Global Target List of likely prospects
 - First email to entire state, 2nd email is targeted to cities

Define Your Investor Targets (cont.)

- Creating a Global Target List
 - Your internal contact list
 - Investor contact databases
 - General investor list → **1-2% hit rate** (*Whitehall Financial Data*)
 - List of investors interested in your fund strategy → **3-5% hit rate** (*BHA*)

WHITEHALL FINANCIAL DATA LLC Dan McDermott (McDermott Capital)
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Investor Search Support Contact Us FAQ's

Investor Search Results

2066 results, 15 results per page Page: 1 of 138 Previous | Next

Select this page | All results | Search again

Company	Mandate Type	Categories	City/State	Country	Released	Mandate
<input type="checkbox"/>	Hedge Fund	Fund of Funds	New York / NY	United States	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Wealth Adviser	Vancouver	Canada	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Consultant, Fund of Funds	London	United Kingdom	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Private Bank	Johannesburg	South Africa	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Tax Exempt	New York / NY	United States	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Wealth Adviser	Geneva	Switzerland	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Wealth Adviser	Austin / TX	United States	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Fund of Funds, Private Bank	Lisboa	Portugal	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Wealth Adviser	Paris	France	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Wealth Adviser	Geneva	Switzerland	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Private Bank	Geneva	Switzerland	Jul 21, 2011	Open
<input type="checkbox"/>	Hedge Fund	Family Office	Lincoln / MA	United States	Jul 18, 2011	Open
<input type="checkbox"/>	Hedge Fund	Wealth Adviser	West Sussex	United Kingdom	Jul 18, 2011	Open
<input type="checkbox"/>	Hedge Fund	Fund of Funds	Geneva	Switzerland	Jul 18, 2011	Open
<input type="checkbox"/>	Hedge Fund	Consultant	London	United Kingdom	Jul 18, 2011	Open

BRIGHTON HOUSE associates Dustin Kinch Settings Logout
(BHA)

Search results: Search again

15 results per page, 5421 results Page: 1 of 362 Next

Actions: --- Select / Unselect all Sort by: Company Name Category City Country AUM Released

Here are your investor profile results:

Company	Mandate type	Category	AUM	City/State	Country	Released	Mandate
<input type="checkbox"/> 1. Brighton House Associates	Hedge Fund	Consultant		Cincinnati OH	United States	Jun 08	OPEN
<input type="checkbox"/> 2. Brighton House Associates	Private Equity Fund	Family Office		New York NY	United States	Jun 08	OPEN
<input type="checkbox"/> 3. Brighton House Associates	Long-Only Fund	Wealth Adviser	\$50 M	Marburg	Germany	Jun 08	OPEN
<input type="checkbox"/> 4. Brighton House Associates	Fund of Hedge Funds	Wealth Adviser	\$50 M	Marburg	Germany	Jun 08	OPEN
<input type="checkbox"/> 5. Brighton House Associates	Hedge Fund	Wealth Adviser	\$50 M	Marburg	Germany	Jun 08	OPEN
<input type="checkbox"/> 6. Brighton House Associates	Fund of Private Equity Funds	Family Office	\$100 M	Madrid	Spain	Jun 08	OPEN
<input type="checkbox"/> 7. Brighton House Associates	Hedge Fund	Fund of Funds	\$30 M	London	United Kingdom	Jun 08	OPEN
<input type="checkbox"/> 8. Brighton House Associates	Hedge Fund	Family Office		New York NY	United States	Jun 08	OPEN
<input type="checkbox"/> 9. Brighton House Associates	Hedge Fund	Wealth Adviser		Belville	South Africa	Jun 08	OPEN
<input type="checkbox"/> 10. Brighton House Associates	Hedge Fund	Insurance		London	United Kingdom	Jun 08	OPEN
<input type="checkbox"/> 11. Brighton House Associates	Long-Only Fund	Wealth Adviser		Belville	South Africa	Jun 08	OPEN
<input type="checkbox"/> 12. Brighton House Associates	Real Estate Fund	Insurance		Paris	France	Jun 08	OPEN
<input type="checkbox"/> 13. Brighton House Associates	Fund of Hedge Funds	Family Office		Yeroskipou	Cyprus	Jun 08	OPEN
<input type="checkbox"/> 14. Brighton House Associates	Hedge Fund	Family Office		Yeroskipou	Cyprus	Jun 08	OPEN
<input type="checkbox"/> 15. Brighton House Associates	Fund of Hedge Funds	Family Office		Nicosia	Cyprus	Jun 08	OPEN

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Are you looking for information on an investor and cannot find it in our database?
Click here to fill out a request form and a BHA analyst will research and profile the investor and forward you the information.

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Source and Compile Your Distribution List

- Format the data
 - Correct names
 - Avoid multiple emails to same contact
 - Avoid general emails
 - Remove “Do Not Calls”

	A	B	C	D	E	F	G	H	I	J	K
1	id	date_entered	date_modified	first_name	last_name	title	street	city	state	email1	
2	3c845699-	1/15/2010 8:49	1/15/2010 8:49	Marc	...	Partner & CFO	909 Montgc	San Francisco	California	info@xyzcapital	
3	2c848847-	1/15/2010 8:53	1/15/2010 8:53	Richard	...	Chairman	909 Montgc	San Francisco	California	info@xyzcapital	
4	cc4ad746-	12/31/1969 13:00	12/31/1969 13:00	Dr	...	Partner	220 Halleck	San Francisco	California	info@abccapital.com	
5	93faf01c-f	12/31/1969 13:00	12/31/1969 13:00	Anthony	...	Principal	4225 Execut	La Jolla	California	anthony@xyzadvisers.com	
6	8c4feb3f-c	12/31/1969 13:00	12/31/1969 13:00	Russell	...	Principal	4225 Execut	La Jolla	California	anthony@xyzadvisers.com	
7	e81d9931-	12/31/1969 13:00	12/31/1969 13:00	Ray	...	Portfolio Manager	701 B Stree	San Diego	California	ray@abcadvisors.com	
8	277d4ea8-	12/31/1969 13:00	12/31/1969 13:00	Aaron	...		2019A State	Santa Barbara	California	www@abcadvisors.com	
9	4cf43d54-	12/31/1969 13:00	12/31/1969 13:00	Aaron	...		2019A State	Santa Barbara	California	www@abcadvisors.com	
10	94511985-	1/15/2010 8:38	1/15/2010 8:38	Andrew	...	Principal	50 Californi	San Francisco	California	www@abcadvisors.com	
11	4fbd6bcf-	1/15/2010 8:38	1/15/2010 8:38	Andrew	...	Principal	50 California	Street	California	www@abcadvisors.com	
12	e27c7043-	1/15/2010 8:38	1/15/2010 8:38	Alex	...	General Partner	2480 Sand H	Menlo Park	California	www@abcadvisors.com	
13	d9f4336d-	1/15/2010 8:38	1/15/2010 8:38	Alex	...	General Partner	2480 Sand Hill	Road	California	www@abcadvisors.com	
14	cb1cfca2-f	1/15/2010 8:40	1/15/2010 8:40	C. Andrew	...	Managing Director	One Maritir	San Francisco	California	www@abcadvisors.com	
15	9eb6dfe1-	1/15/2010 8:40	1/15/2010 8:40	C. Andrew	...	Managing Director	One Maritime	Plaza	California	www@abcadvisors.com	
16	727e07cc-	1/15/2010 8:53	1/15/2010 8:53	R. Andrew	...	Principal	3000 Sand H	Menlo Park	California	www@abcadvisors.com	
17	5bdf6000-	1/15/2010 8:53	1/15/2010 8:53	R. Andrew	...	Principal	3000 Sand Hill	Road	California	www@abcadvisors.com	
18	ab6c0e4c-	1/15/2010 8:38	1/15/2010 8:38	Allen	...	Partner	3000 Sand H	Menlo Park	California	www@abcadvisors.com	
19	1b8938a0-	1/15/2010 8:38	1/15/2010 8:38	Allen	...	Partner	3000 Sand Hill	Road	California	www@abcadvisors.com	
20	476f4785-	12/31/1969 13:00	12/31/1969 13:00	Mr	...	Partner/PM	1299 Ocean	Santa Monica	California	www@abcadvisors.com	
21	b3083c24-	12/31/1969 13:00	12/31/1969 13:00	Mr	...	Partner/PM	1299 Ocean	Santa Monica	California	www@abcadvisors.com	
22	6cadfc2e-	1/15/2010 8:38	1/15/2010 8:38	Amy	...	Senior Associate	485 Ramona	Street	California	www@abcadvisors.com	

Executing an Email Campaign

- Subject line
 - Determines open rate 90% of the time
 - State your purpose
 - Use...spacing – characters for ease of understanding
 - Limit to approximately 90 characters
- Body
 - Hook and elevator pitch
 - Action item
- Follow Up
 - Approach: phone versus email
 - Multiple attempts
 - Phone canvassing

Examples of Email Formats

- Meeting requests for a marketing road trip

First attempt: sent 2 weeks prior to trip

Second attempt: sent 3-5 days after first request

Final attempt: sent few days before trip

Meeting Request-Daniel McDermott-Founder of Brighton House-California Trip June 13-17
Daniel McDermott
Sent: Tue 6/7/2011 8:37 AM
To: Daniel McDermott

2nd Attempt-Meeting Request-Founder of Brighton House-California Trip June 13-17
Daniel McDermott
Sent: Tue 6/7/2011 8:42 AM
To: Daniel McDermott

Final Attempt-Meeting Request-Founder of Brighton House-California Trip June 13-17
Daniel McDermott
Sent: Tue 6/7/2011 8:51 AM
To: Daniel McDermott

Hi John,

I sent an email to you last week but did not hear back. I am going to be in California next week meeting with clients and I wanted to reach out and see if a meeting makes sense.

Brighton House Associates (BHA) interviews institutional and family office investors to learn of their allocation plans towards alternatives. BHA's strategic advantage is a team of 25 research analysts in Boston, which cover the allocation plans of 35,000 global investors across 13 different categories. Every week, BHA analysts interview hundreds of family office and institutional investors to gather their allocation interests towards hedge funds and private equity.

Over 350 hedge fund and private equity managers leverage BHA's robust lead generation infrastructure of analysts, research, and technology as a marketing support extension of their internal sales efforts. Successful clients of BHA have internal marketing teams whose efforts are augmented by BHA's investor research and services.

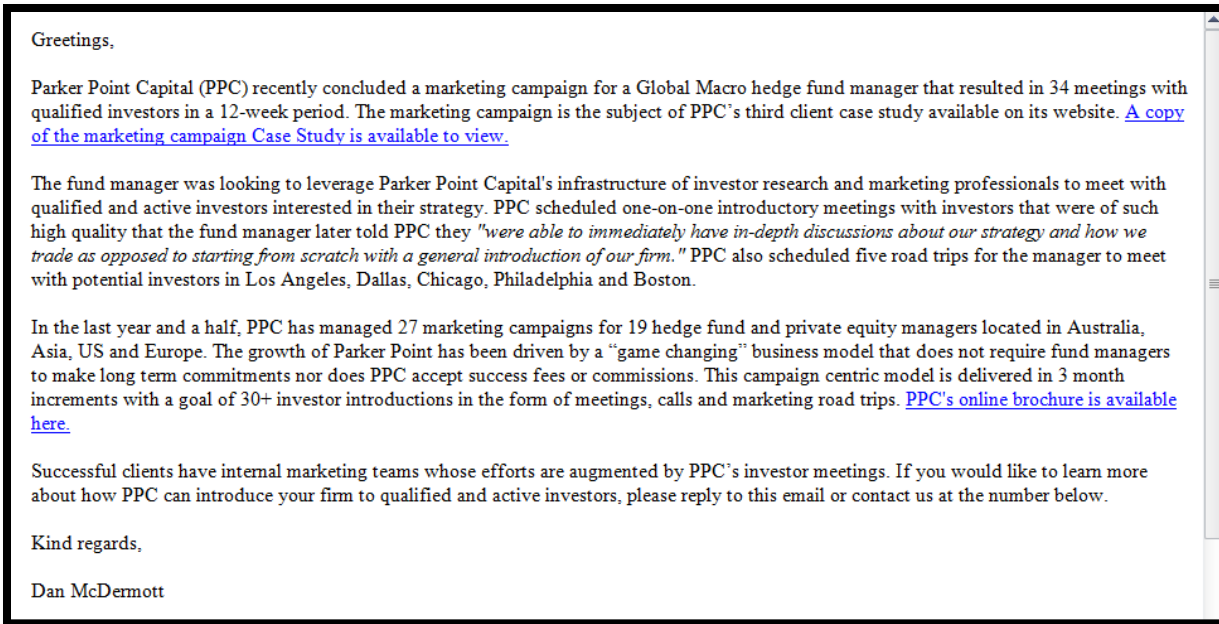
If you have time on Wednesday the 15th or the morning of the 16th in San Francisco to meet, I would be happy to get together so I can introduce myself and BHA.

Kind regards,
Dan

- Consistently results in 15+ meetings per week
- Second and final emails have a higher response rate than first attempt
- Use email software to track opens and clicks

Examples of Email Formats (cont.)

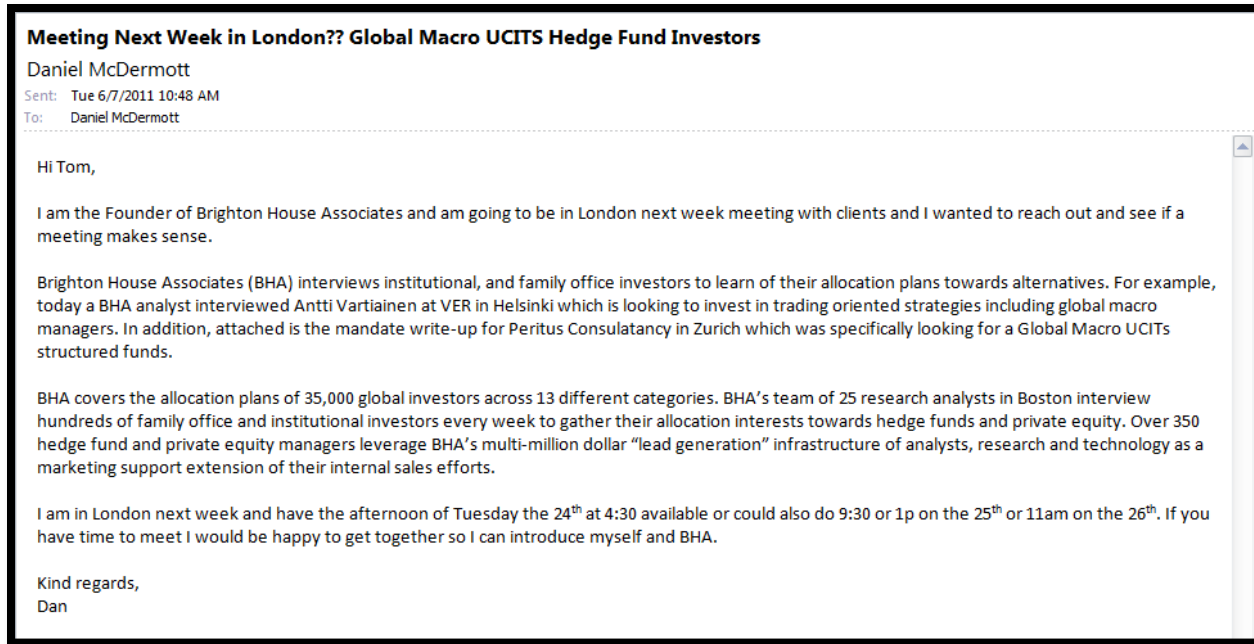
- Email containing click-throughs



- Make attachments into clickable links
- Use multiple click-throughs
- PPC includes links to relevant documents and link to general brochure

Examples of Email Formats (cont.)

- Customize email around recipients' current interests



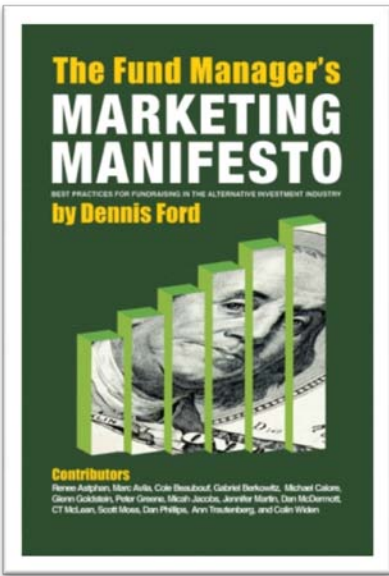
Customize:

- Email based on recipient's current interest
- Subject line
- Body of email

Increasing Your “Hit Rate”

- Cut through the “noise” and get noticed
 - Investors get hundreds of unsolicited emails, calls and pitch books each week
 - High competition: 20K alt. fund managers chasing after 50K investors
 - A compelling pitch and a value driver are mandatory
- Target the right contact for maximum return
 - Small firm → CIO
 - Medium investor → CIO and MD
 - Large investor → Analyst, Director and MD
- Using email software

The Fund Manager's Marketing Manifesto



The Fund Manager's Marketing Manifesto: Best Practices for Fundraising in the Alternative Investment Industry

- Actionable solutions to marketing challenges facing alternative investment fund managers
- Step-by-step guide
 - Section 1 – The Preliminaries of a Fundraising Campaign
 - Section 2 – Identifying and Engaging with Potential Investors
 - Section 3 – Developing Relationships on the Campaign Trail
 - Section 4 – Nurturing Your Investor Relationships

The book is available for purchase at www.brightonhouseassociates.com

Download a free chapter of *The Marketing Manifesto* on The Brighton House Associates website: [Researching the Investor Universe to Identify Prospects](#)

Brighton House Associates

- **Brighton House Associates** is a research company that collects valuable investor information through one-on-one interviews that reveal investor fund strategy preferences, fund manager requirements, and allocation timelines. Through these interviews, the *BHA* research team identifies where alternative institutional capital is currently in play and where it will be allocated. This investor mandate information is sold to alternative managers as part of the BHA database subscription service. BHA's unique ability to pinpoint where investors are targeting their dollars helps fund managers significantly improve their marketing efforts.
- At the beginning of 2011, of the 7,000 active mandates collected by Brighton House researchers, 821 were from hedge fund investors that are currently evaluating and allocating capital to managers with under \$200M in AUM. With investors increasingly emphasizing and evaluating Hedge Fund run by Emerging Managers, 2011 will be an extremely important year for emerging funds looking to build their asset base. **The Fund Manager's Marketing Manifesto** addresses the many challenges and obstacles that prevent many funds from running successful marketing campaigns.

Daniel McDermott

Founder

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