

FOR HEDGE FUND MANAGERS

# HOW TO WIN

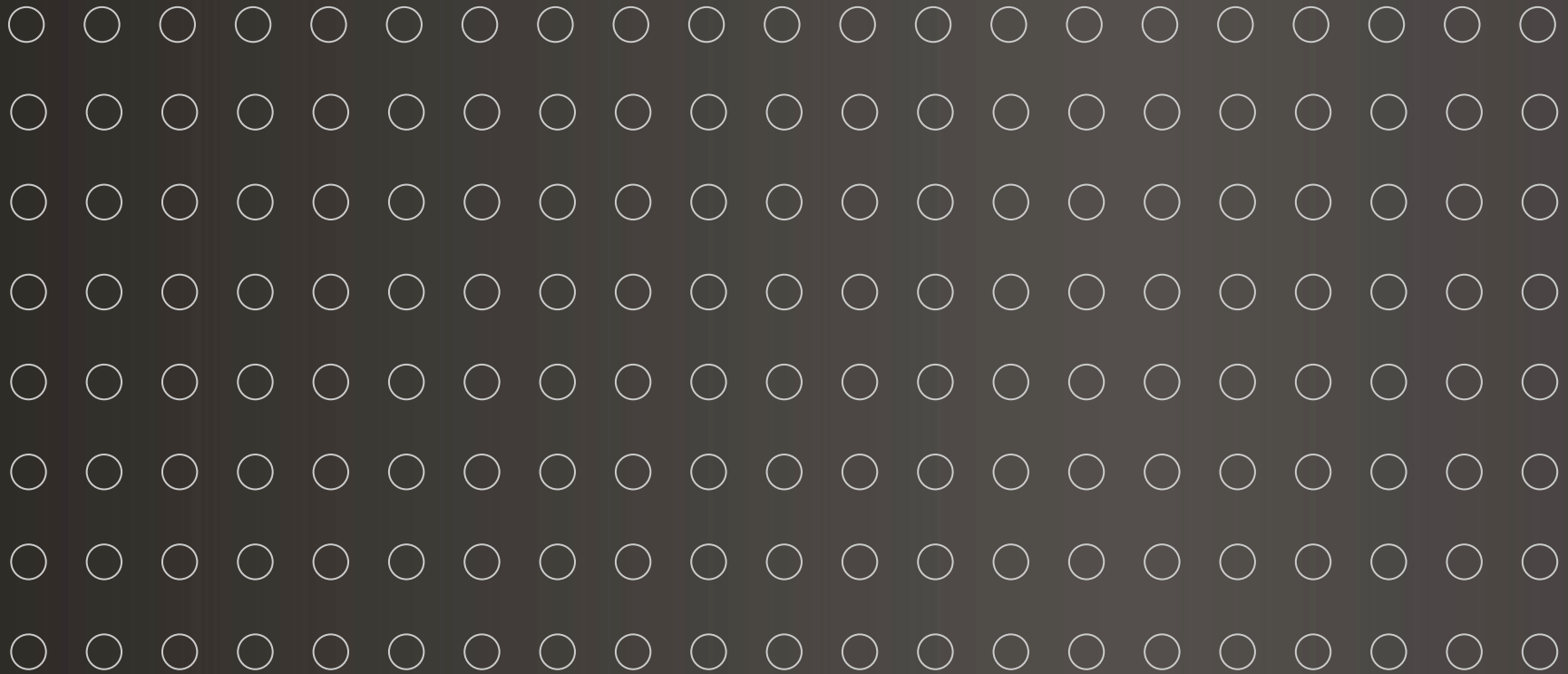
HOW TO  
BRIDGE WHAT YOU  
ARE DOING  
**TODAY**  
WITH THE SUCCESS  
YOU COULD BE  
ACHIEVING  
**TOMORROW**

Hedge Fund **Investor Network**

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**As a hedge fund manager,  
you are**

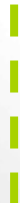
**1 in 10,000**



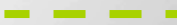
Which one do you like better?

# When a person buys a computer, the decision is Mac or PC?

Which one suits your needs?



Which one do you know and trust?



**But when someone  
wants to invest in a  
hedge fund,  
they are faced with an  
impossible set of  
choices.**

**Often  
everyone  
looks the same.**

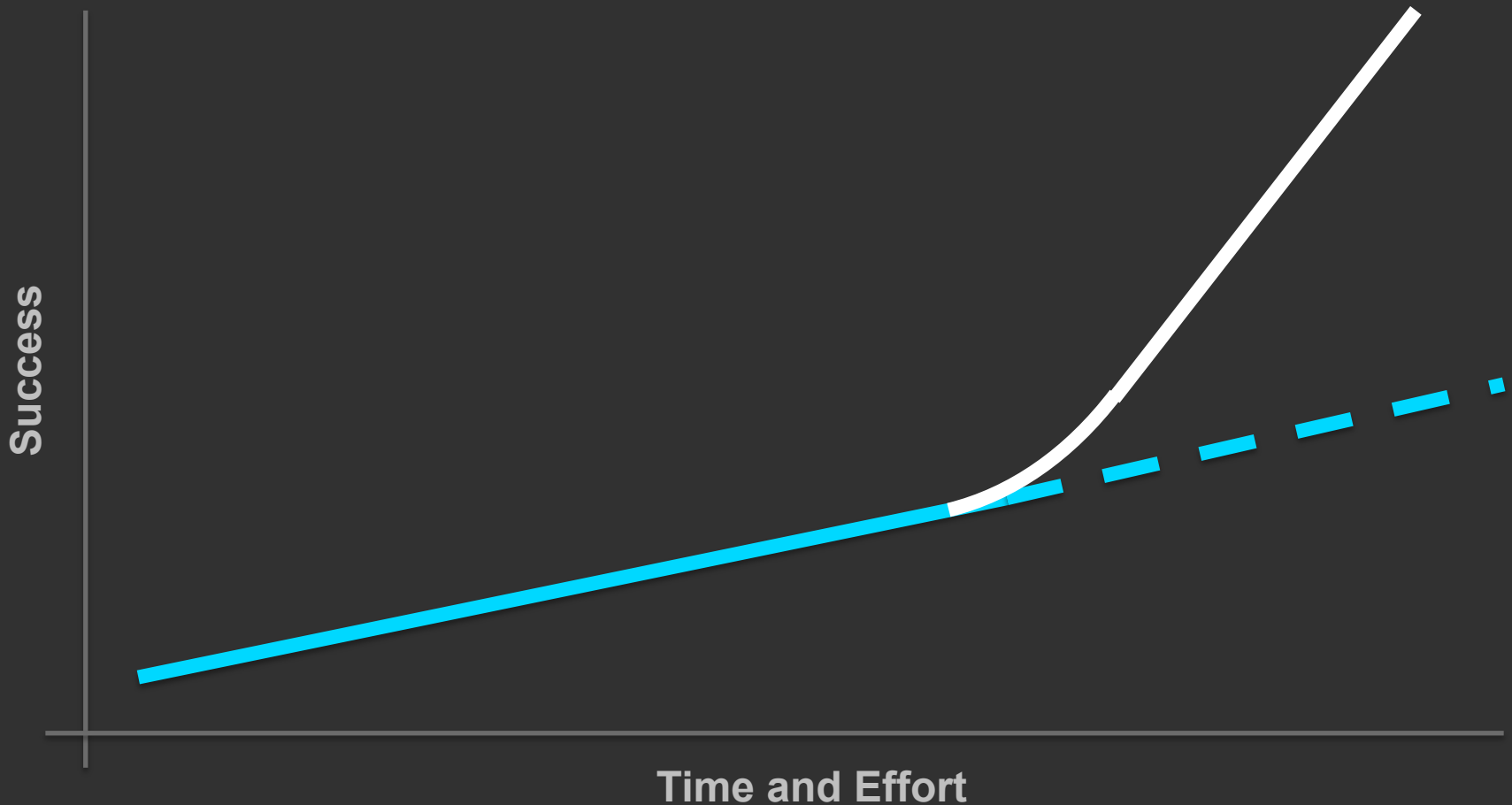
**How do you  
compete?**

**What makes you  
different?**

**Things can be  
easier.**

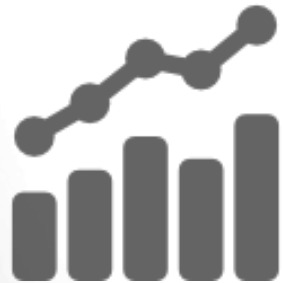


Your success curve  
can be **steeper**.



# YOU CAN

**GROW  
FASTER**



**SAVE  
TIME**



**RETAIN  
CLIENTS**



**WHAT IS A  
BRAND?**

**IT IS NOT**  
**what you think**  
**or say it is.**

**IT IS**

**how other  
people feel  
about you.**

“So?”

you ask.

# People make decisions based on how they feel.

What car should I purchase? — — —

— — — What restaurant should I go to?

What mobile phone should I buy?



**And buy  
products and services  
based on**

**TRUST**



# When people trust you, you receive:

**MORE  
AWARENESS**

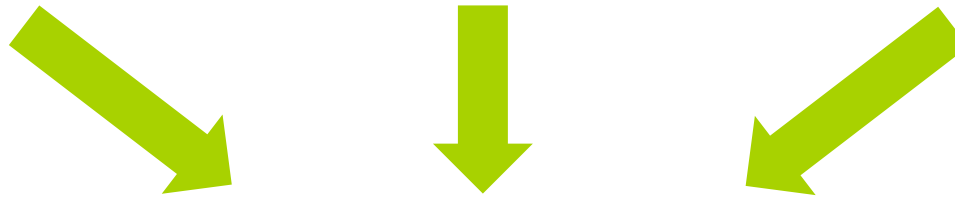
“When people like things,  
they talk about them more.”

**MORE  
LOYALTY**

“If you have an emotional  
attachment to something, you  
use it longer and more often.”

**MORE  
PERCEIVED  
VALUE**

“Makes a person more  
attracted to and loyal to a  
product or brand.”



**MORE  
REVENUE**

**The question is...**

**Do hedge fund  
investors **trust** you?**

And...

What do people  
**say** or **remember**  
when they think about  
your firm?

And...

Do people **believe** in  
what you do?

**If you can help people  
trust and believe  
in you,  
you will win.**

**But you have to change  
how you approach  
things.**

**EVERYTHING  
YOUR FIRM DOES  
MUST BE A  
BRAND DECISION**

**“How does  
the way we do**

**compliance  
marketing  
risk management**

**impact our brand?”**



**BUILDING**

**A BRAND**

**Good news.**  
**There is a formula.**

# FORMULA

**INSPIRATION**

“I believe you are going to **make** money”

**+**

**TRUST**

“I believe you are going to **protect** my money.”

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**CLIENTS**

# **People that believe in you and trust you will...**

- **Buy your service**
- **Stay loyal**
- **Talk to others about you**

**3 RULES**

# Be different.

Stand out from the crowd.



# Deliver great experiences.

Be memorable and appeal to people's emotions.



2

# Give people more than they expect.

They will trust you.



3



**What your  
firm must know and  
accept...**

**Every interaction is an  
opportunity to  
improve (or destroy)  
your brand.**

Phone conversations

Emails

Website

Online presence

Marketing deck

In person meetings

Conferences

Television

News flow

Twitter

LinkedIn

Other people

Marketing collateral

Thoughtfulness

Performance updates

Service providers

Timeliness

**Touch points**  
**are the moments**  
**where your trust**  
**is built and lost**  
**every day.**

# Applicable to all hedge funds

**LOW  
AWARENESS / AUM**



**BUILD TRUST**

**HIGH  
AWARENESS / AUM**



**KEEP TRUST**

**A few checks**

**If an investor can't  
state your edge,  
you failed to  
communicate it.**

**If an investor isn't  
raving about your firm,  
you haven't  
inspired them.**

**Dispelling  
some common  
practices and beliefs**



**“We email our performance estimates and newsletters every month, and that’s building brand value.”**

**FACT**

**Investors are getting  
slammed with emails.**

**(are you contributing?)**

**“If we perform well,  
investors will come.”**

**FACT**

**You're a money  
manager.  
No performance =  
no product.**

**(performance is expected)**

**“We’re not allowed to  
‘look’ good.”**

**FACT**

**The SEC has never  
reprimanded a  
hedge fund for  
choosing a nicer  
shade of blue.**

**(when people see your firm's appearance,  
what do they think?)**

## COMMON BELIEF: 4

Repeatable process

World-class service providers

High caliber team

**“If we have the  
minimum requirements,  
we’ll raise lots of  
money.”**

Solid infrastructure

Marketing materials

Consistent track record

**FACT**

**Requirements are  
starting points.  
Not the destination.**

**(what you do from here  
is what makes the difference.)**



# FIRST STEPS

5 key areas to focus on

Every person will see your website or search for your firm. The experience they have will form their impression. As a service provider versus a tangible product, your website gives people the visual they need to picture you.

Does your website:

Inspire people?

Communicate what you do?

Show a commitment to investors?

Create a positive, accurate and memorable experience?

Provide a gateway for people to learn more?

Create value for your firm?

# Turn your website into an asset

Often, investors need to sell your firm to others in order for capital to get allocated. Are you helping them have internal success?

Can someone flip through your marketing deck in 20 seconds and know:

What you do?

What makes your firm unique?

First, your message and identity has to be working. Then, you reinforce it at every possible touch point.

**Apply  
effective  
messaging  
and design  
consistently**

**HFIN Creative**

When things are easy and rewarding to access, people do it more.

You can have people accessing your information more often and experience the benefits of higher engagement, loyalty and trust.

**Make it easy  
for people  
to be your  
prospects and  
clients**

**HFIN One**

Information is power. You can use it to provide more tailored, timely and proactive investor service.

No more guesswork and blanket approaches to communication.

Rather, swift and smart sales execution and the ability to deliver more than people they expect, so you can build more meaningful relationships and achieve better results.

**Use  
information  
to service  
everyone  
better**

**HFIN Traffic**

**HFIN Cloud Docs**

Whether it is an email, a phone conversation, a website visit, an in person meeting or a response to an event, each interaction you have forms an impression.

People remember how they feel over what they read.

Make every interaction move every relationship one step closer to achieving your goals.

**Every touch  
point must  
move  
relationships  
forward**

**Let us help  
you win**

[www.hfinone.com/hedgefundsignup](http://www.hfinone.com/hedgefundsignup)

**HFIN One**

# Recommended Readings

**“The Brand Gap”**

**Marty Neumeier, Neutron LLC.**

<http://www.slideshare.net/coolstuff/the-brand-gap>

**“Branding Moments”**

**Bill Beard, Beard Branding.**

<http://www.slideshare.net/wrbeard/lean-branding-branding-moments>