



*"Hundreds of private investors have shared with me a common complaint: firms deliver a 'canned', usually boring, and predictable presentation."*

– Charlotte Beyer  
Relationship Alpha  
CFA Institute  
Research Foundation

## Marketing Differentiation:

### Distinguish Your Business With Clear Messaging and Character

In the fragmented wealth management industry where virtually all players market in the same way, it is difficult to discern one firm from another. For firms to differentiate, they need to articulate their business models and showcase more of their personality to produce more creative and emotionally resonant communications.

#### Our Solution

We help wealth managers differentiate their marketing efforts using a proven process to:

**Improve your messaging** to better define capabilities, encourage transparency and infuse personality into all of your communications

**Recommend marketing activities** to enhance client engagement and reach new prospects with an appeal across multiple generations

#### Step 1: Comprehensive SWOT

We conduct a comprehensive SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats) that serves as the basis of our efforts. This includes:

- *Communications Audit:* Review *all* your marketing, communications and plans
- *Competitor Review:* Analyze the messaging and marketing programs of 5-8 firms
- *Leadership Interviews:* Gather insights on your firm's business and personality
- *Employee Surveys:* Develop an online survey to give all employees a voice
- *Client Research:* Review all client research; if this does not exist, we encourage investing in our Client Audits

#### Step 2: New Messaging

Based on the SWOT findings, we develop new language:

- **Key messaging, including a positioning statement**, to reflect unique strengths, differentiators and the character of your firm
- **New descriptors and a glossary of definitions** to convey your business model with clarity and transparency
- **Tagline/value proposition** to characterize your intrinsic value

*“Wealth managers need to differentiate their marketing more than ever before. This starts with a focus on enhancing the customer relationship and must include the delivery of clear, transparent messaging, as well as creative, outreach strategies to reach clients across multiple generations.”*

– Steve Proitano  
Head of Family  
Enterprise Strategic  
Solutions  
PKF O’Connor Davies

### Step 3: Marketing Recommendations

Based on the SWOT, we offer marketing recommendations to enhance client relationship building. For example:

- **Sphere of Influence:** Identify key influencers, e.g. investment specialists, tax lawyers, government affairs gurus, etc. for education and outreach purposes
- **Event Marketing:** Develop client-centric events focused on topics of significant interest to your clients; and create events featuring what other clients are doing
- **Thought Leadership/Content Marketing:** Create a platform that resonates with clients and key influencers; share your expertise through white papers, blogs, etc. across several media platforms
- **Technology and Digital Communications:** Develop and disseminate content through investor portals, apps, and other technology communication tools

### Optional: Message Application, Design and Implementation

We apply the new messaging and provide design and compelling graphics to your marketing based upon request. We can also implement various marketing recommendations based on staffing needs at negotiated fees that reflect project parameters.

- Website and Sales Collateral
- Social Media/Network pages
- Presentations
- Marketing Recommendations

### Flexible Fee Structure

Our solution (Steps 1-3) is offered as a standard package with a sliding fee determined by the scope of the underlying elements. For all other activities, we determine fees based on the parameters of the assignment and our level of involvement.

### Relevant Experience

MJ Lilly Associates, LLC is a strategic communications consultancy. For more than 25 years, our team of financial marketing professionals has worked with a wide range of firms serving UHNW and Family Office clients – from private banks and securities firms to asset managers and hedge funds. Please contact Maria Lilly at [mjlilly@mjlilly.com](mailto:mjlilly@mjlilly.com) or phone 718-855-1853 for more information.

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