

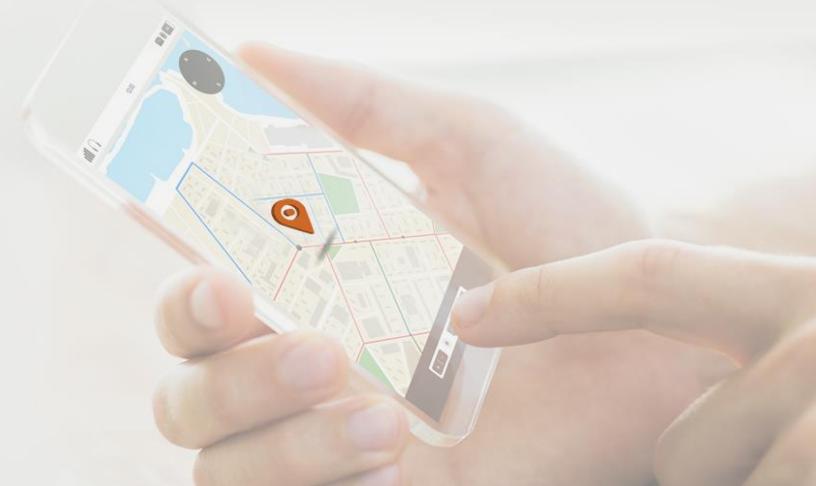
NAVIGATING THE EVOLVING MARKETING LANDSCAPE

2016
ANNUAL
CONFERENCE



The Roosevelt Hotel NYC | Nov. 7 & 8

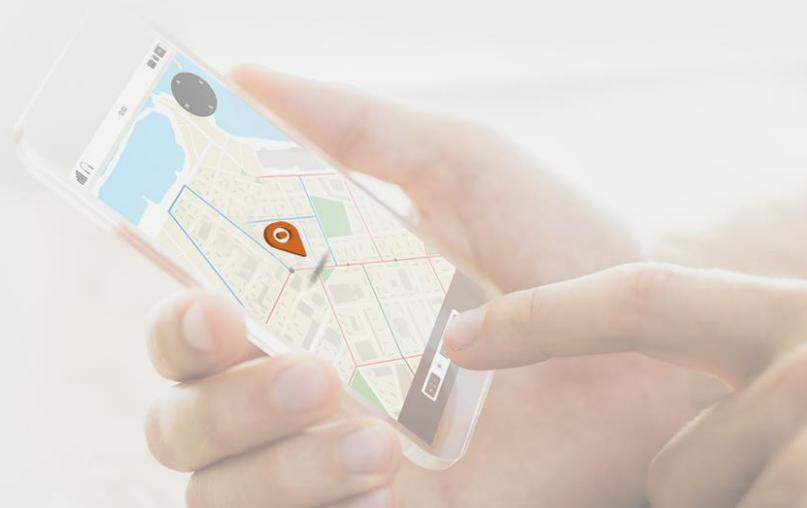
PAICR | THE ASSET
MANAGEMENT
MARKETING
ASSOCIATION



Increase AUM with Marketing Automation



Joe Paone
Sr. Manager, SMB Marketing
Marketo



Meeting Agenda

1. Industry Overview

2. Segmentation

3. Personalization

4. Nurture

5. Lead Scoring

6. Measurement & Analytics

7. Case Study

State of Asset Management Today:

1. Your clients' reality
2. Your challenge
3. The path forward



A photograph showing the backs of several people's heads, suggesting a group of individuals in a meeting or presentation setting. The background is slightly blurred.

Asset Managers need to respond to
growing client expectations or face the
risk of losing them

**\$58 trillion in wealth
is expected to move
from one generation
to the next**



**90% of heirs change
advisors after wealth
transfer**

**Clients expect more
personalized
communications**

**25% of investors leave
their asset managers
after just 2-3 years**



**Clients expect more
digitally connected
experiences**



**80% of under-40
investors indicated that
they would leave their
asset management firm
if it fails to provide an
integrated channel
experience**

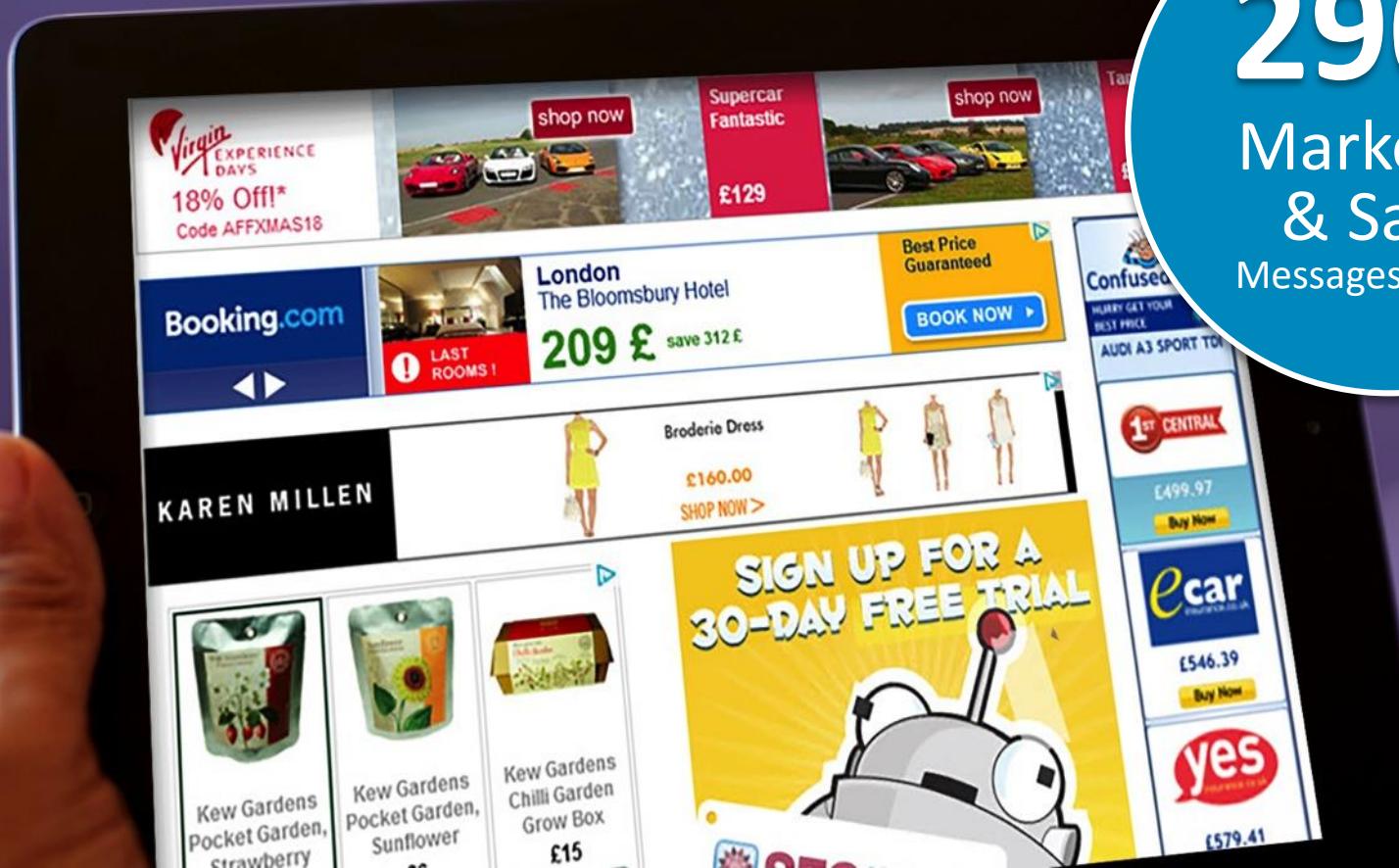
Your Challenge

How do you get clients to choose you and stay with you?

How do you be most relevant to them?

How do you execute and measure this at scale?

Todays World

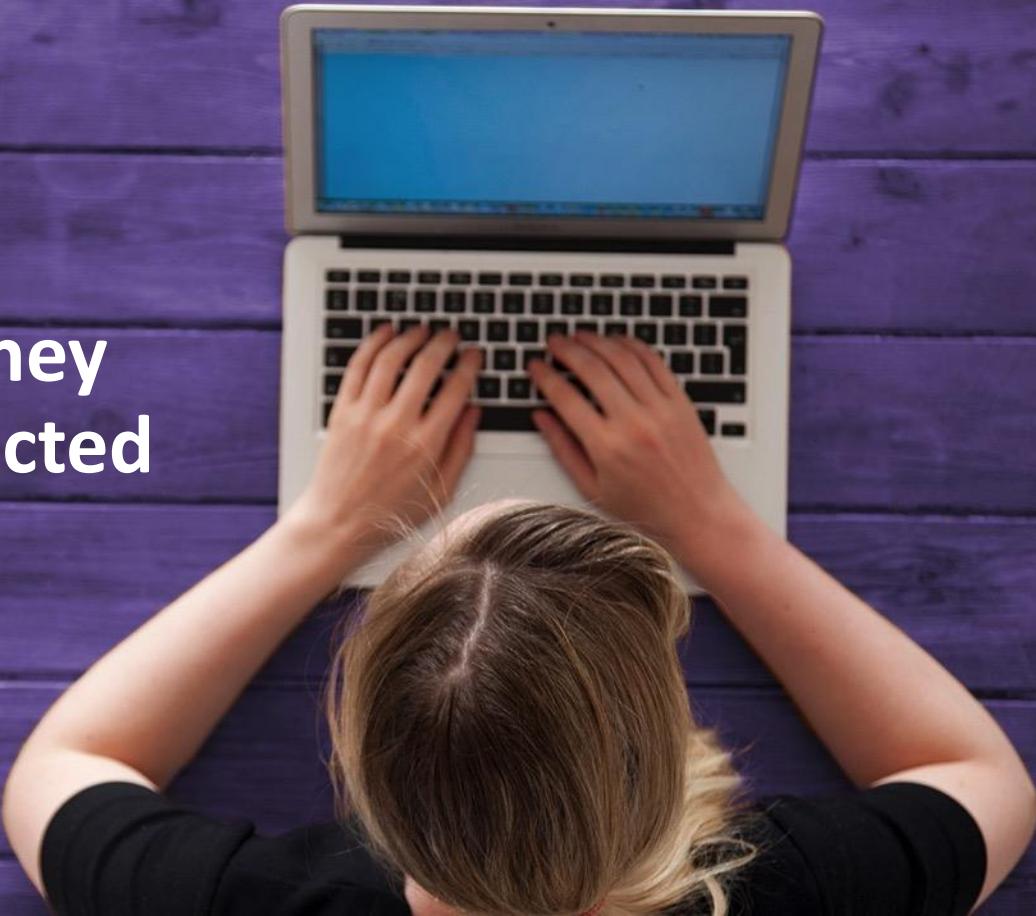


2900
Marketing & Sales
Messages Per Day

Buyers are Self-Directing Journeys

66% to 90%
of a Buyer's Journey
Today is Self-Directed

(Forrester, 2014)



And Demand a Personalized Experience



87% of people demand a meaningful brand experience (Edelman Consulting, 2014)

A Transformation in Investor Engagement

Mass Marketing

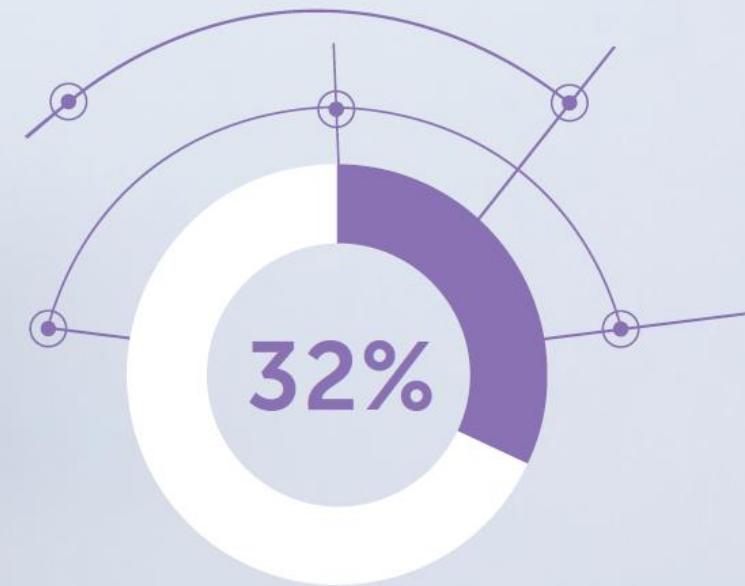
Focus on the message



Engagement Marketing

Focus on long-term relationships





of marketers pursue a data-first strategy,
and less than half of marketers feel prepared
for a data-driven marketing future.

Source: B2B Marketing and Marketscan

Why Is Data-Driven Marketing a Challenge for Asset Managers?



Why Is Data-Driven Marketing a Challenge for Asset Managers?

Acquisition

Retention

Asset Consolidation/X-sell

For each client journey, the data you need may exist in multiple locations. This makes driving business intelligence extremely difficult.

The Client Experience Disconnect



Searches



Visits Website



Downloads



Reads Email



Attends Events



Calls



Makes Investment



Searches

Visits Website

Downloads

Reads Email

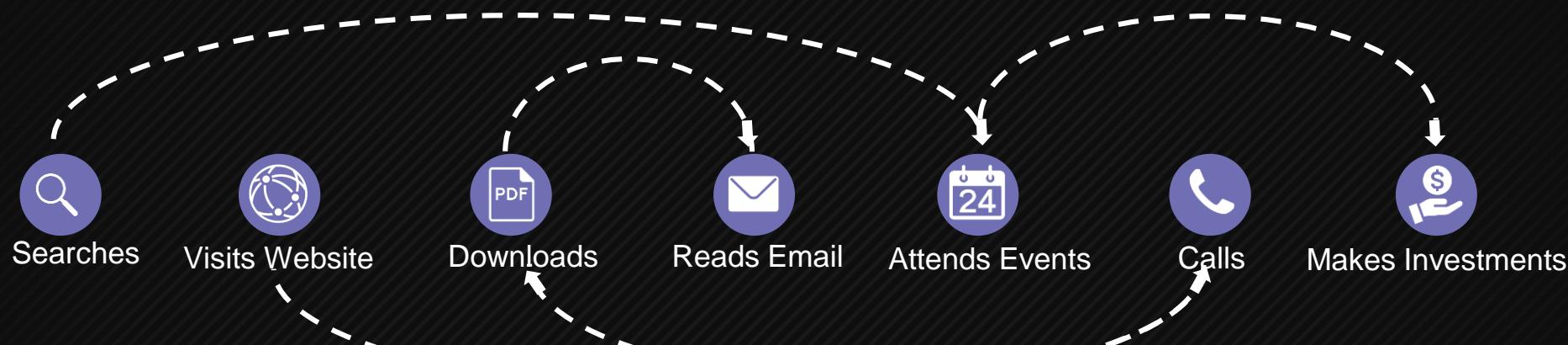
Attends Events

Calls

Makes Investment

Reactive

Proactive and real-time

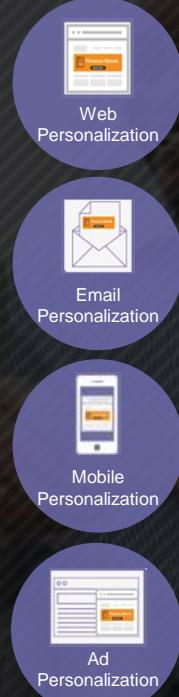


Transform Your Client Engagement

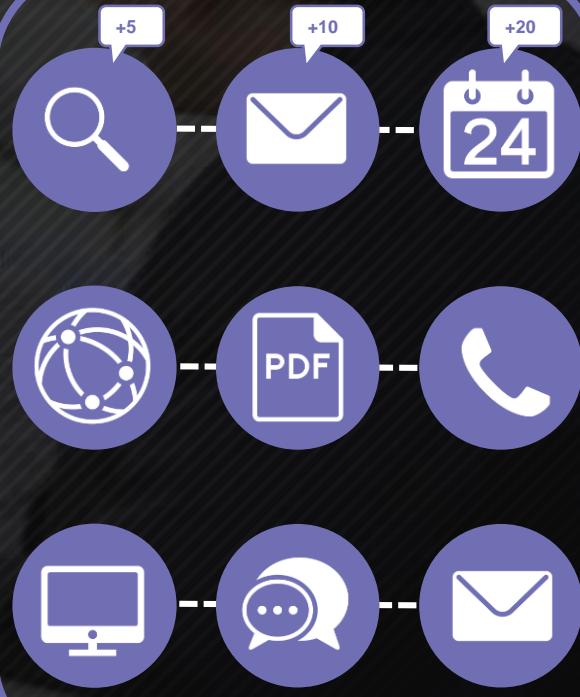
Segment



Personalize



Nurture and Score



WHAT IS MARKETING AUTOMATION?



Central Database
Segment and target the right message to each investor or client



Engagement Marketing Engine
Listen and respond to investors in real-time, providing personal and relevant communications



Analytics Engine
Understand what worked, what didn't, and where you can improve

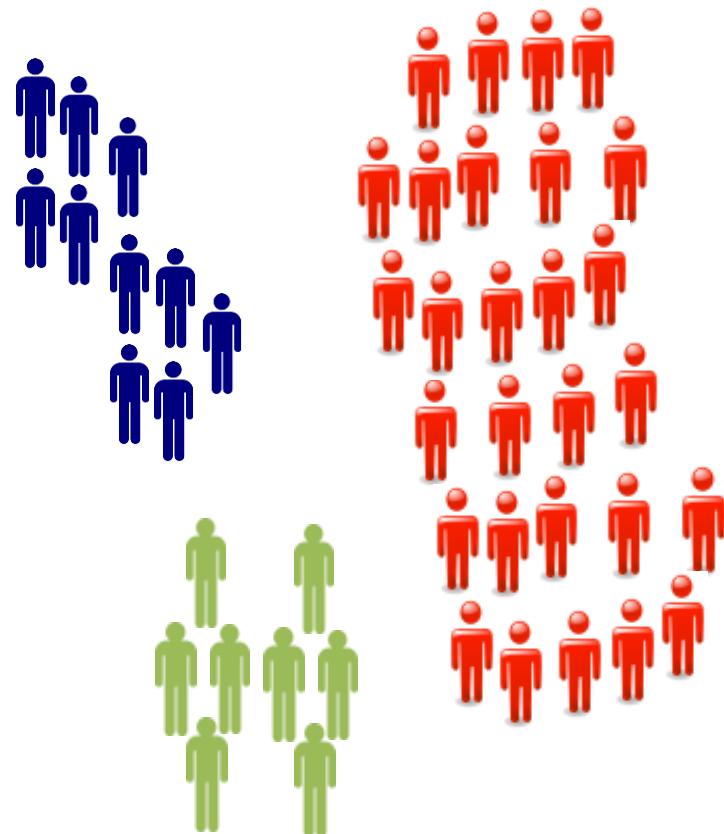
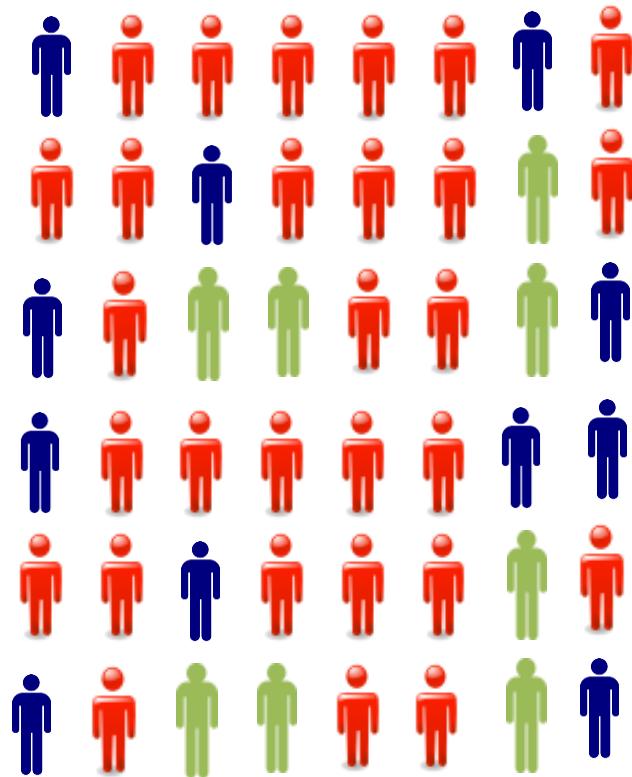
How Can Marketing Automation Help?

- **Automatically segment** your investors based on demographics and behaviors
- Engage your clients throughout all market conditions with **personalized and automated communications across all channels throughout their lifecycle**
- Create a **single view** of your clients and prospects
- Prioritize sales/wholesaler follow-up through **lead scoring**
- **Measure and track** marketing campaign effectiveness and prove ROI
- Get the **right message** to the **right investor** at the **right time**



Segmentation





Why Segmentation is Important

- 39% of email revenue is generated through targeted emails sent to specific segments¹
- Segmented email campaigns produce 30% more opens than undifferentiated messages²
- 77% of email ROI comes from segmented, targeted and triggered campaigns¹
- 84% of marketers who use segmentation rate their email ROI as good or excellent³

Right message to the right investor

¹DMA 2014

²Monetate 2012

³Econsultancy 2012

<http://www.towerdata.com/blog/the-roi-of-email-intelligence>

Start with Simple Segmentation



Advisors



Institutional Investors



Individual Investors

Leverage Data

Demographic/Firmographic

Advisors / Institutional Investors

- Investment style
- Company size
- Role
- Location
- AUM



Retail Investors

- Age
- Net worth / Investable assets
- Location
- Gender
- Investment philosophy

Behavioral

- Buying Stage
- Prospect score
- Product Interests

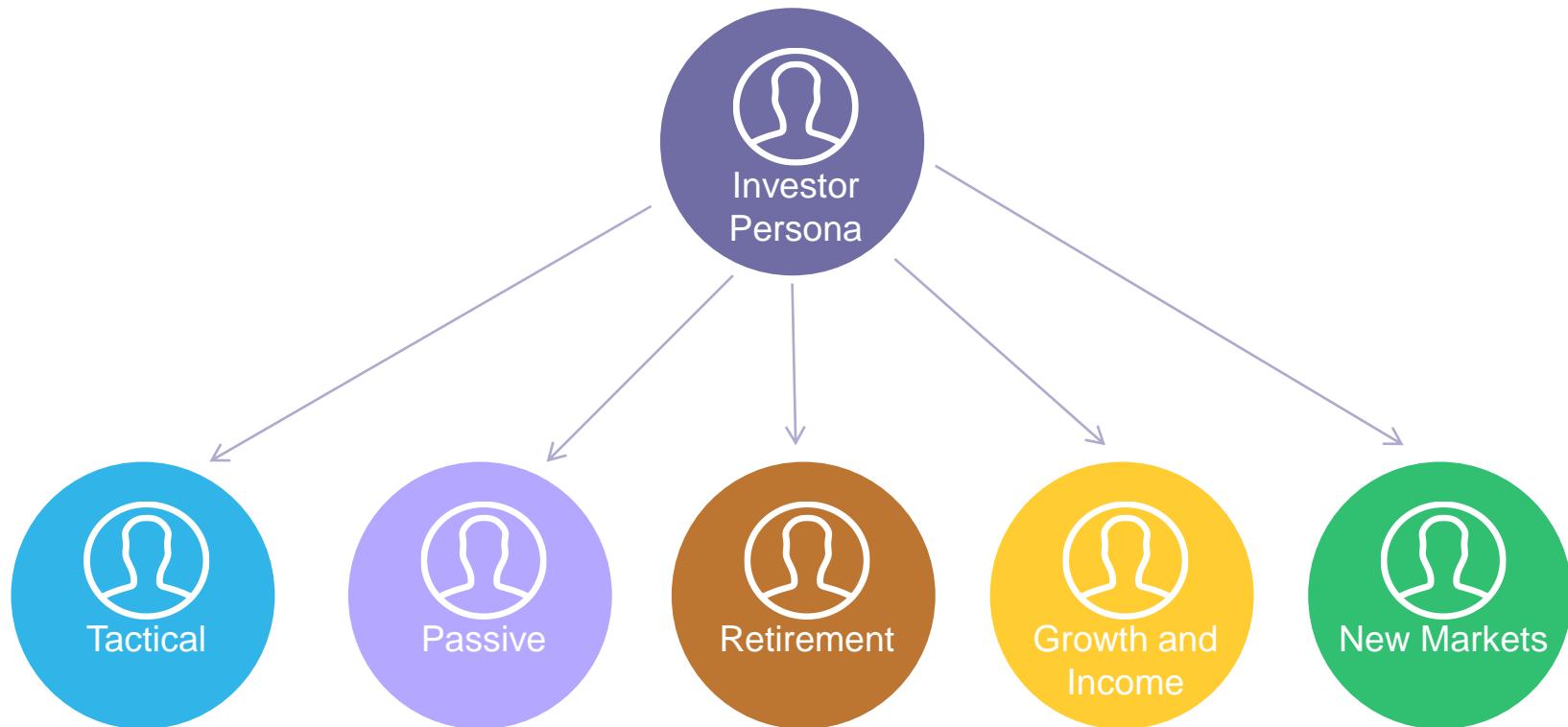


- Engagement
- Activity
- Non-activity

Segment Your Prospect Database



Further Segment by Investor Personas



Map Messages & Products to Investor Segments

Segments	BUY ->	Message A	Message B	Message C	Product 1	Product 2	Product 3
Segment 1		X		X		X	
Segment 2		X			X		X
Segment 3	X		X		X		X
Segment 4	X						

Updates in CRM - Reflected in Segmentations



ABC Advisors

[Twitter](#) [Facebook](#) [LinkedIn](#) [YouTube](#)

[Show Feed](#)

[Contacts \[0\]](#) | [Opportunities \[0\]](#) | [Clarizen Issues \[0\]](#) | [Legal & Sales Ops Cases \[0\]](#) |

Account Detail

[Edit](#) [Delete](#) [Get Contacts ▾](#)

Account Owner	 Jack Bauer
Account Owner Role	NA CS 4 AE
Account Score	100
Institutional / Retail	<input type="checkbox"/>
SDR Owner	
Partner Owner	
Account Name	ABC Advisors [View Hierarchy]
Account Name (Local)	ABC Advisors
Parent Account	
Investable Assets	\$1,000,000,000
Target Account	SDR Target
Target Account Tier	Tier 2
Account Status	
Asset Class	Equities

- Segmentation is a must-have
- Key component in getting the right message to the right investor
- Comprised of demographic, firmographic and behavioral data
- Should be leveraged beyond just email

The Right Message Has Two Components



Relevance



Timeliness

Personalization

It's Time to Get Personal!

- 87% of people demand a meaningful brand experience (Source: Edelman Consulting, 2014)
- 74% of online buyers get frustrated with websites when content like offers, ads, and promotions are irrelevant to their interests. (Source: Janrain & Harris Interactive)
- 59% of buyers who have experienced personalization believe it has a noticeable influence on purchasing. (Source: Infosys)
- 88% of marketers who use personalization says it has a high impact on ROI and engagement. (Source: eConsultancy)

Conversion Rates

33%

Conversion rates for personalized
campaigns

20%

Increase in qualified lead gen
with selected content

**Visitors presented with personalized content convert 5X
more than avg.**



Investable Assets



Geo Location



Investment Objective



Competitor



Investable Assets



Geo Location



Investment Objective



Competitor



Research Report



Local Events



White Paper



Webinar

FROM HIGH-GROWTH BUSINESS TO LARGE ENTERPRISE

Success Comes In All Sizes



glassdoor™

charles
SCHWAB

Curves

ca
technologies

auction
.com™

GE

[SEE MORE](#)

FINANCIAL SERVICES BUSINESSES LIKE YOURS

Experience Success With Marketo



With Marketo, we are more effective acquiring and growing relationships with independent advisors.



Mary Rosai

SVP, Institutional Services Marketing



generations
federal credit union

Marketo has changed the way we work, increasing email campaign contribution to 20% of loan applications.



Wendy Bryant-Beswick

Chief Marketing Officer



PARADIGM LIFE™

We saw ROI of \$1+ million with our reengagement emails. We wouldn't be where we are today without Marketo.



Janae Telford

Digital Content Marketing Manager

REDSTONE
FEDERAL CREDIT UNION

LAZARD
ASSET MANAGEMENT

PIONEER
Investments®

Payoff

Veterans United.
Home Loans

Brinker Capital

[SEE MORE](#)

Increase Engagement



1. Engagement

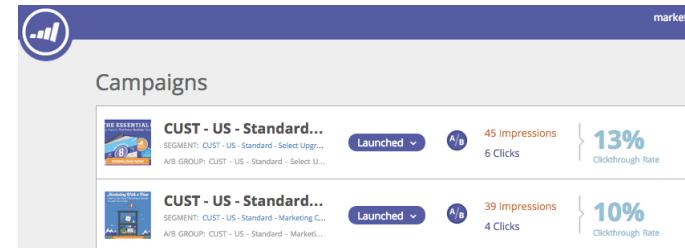
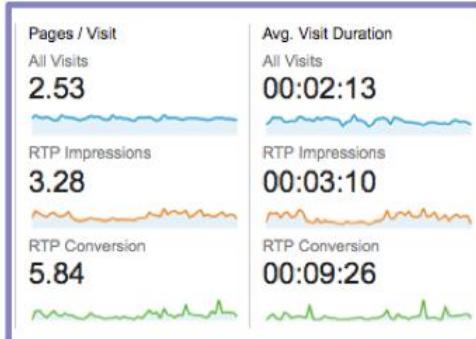
- Average Visit Time
- Page views per Session
- Lower Bounce Rate

2. Conversion

- New Investors
- Goals

3. Revenue

- Transactions
- AUM
- Revenue



Generic Advertising is Good, but...

Forbes • New Posts • Most Popular • Lists • Video

12 Stocks to BUY for 2014

Marketing Automation
ONLINE DEMO

WATCH DEMO

Top Stories

Why Netflix Stands Alone Against Comcast-Time Warner Merger
by Brian Solomon, Forbes Staff

Can Valeant Work Magic On Allergan, Is Pearson Taking On Too Much?
by Steve Schaefer, Forbes Staff

AT&T Edges Above Q1 Earnings Expectations And Raises Outlook
by Maggie McGrath, Forbes Staff

Is The GitHub Scandal's Bizarre Transparency The New Norm?
by Kashmir Hill, Forbes Staff

Jackson-Kerr Tandem Could Halt Knicks' Cycle Of Dysfunction
by Tom Van Riper, Forbes Staff

In Aereo's SCOTUS Hearing, Sides Appear Evenly Matched
The Supreme Court heard oral arguments this morning in a case that will decide the fate of Aereo, a young New York-based company that streams local broadcast television to customers' computers, phones and tablets for \$8 dollars each month.
by J.J. Colao, Forbes Staff

Is The New X4 A Car Or A SUV? Yes, Says BMW
by Hannah Elliott, Forbes Staff

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12 Stocks to BUY for 2014

Market

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HOW TO LEVERAGE DIGITAL MARKETING in the Healthcare Industry



Top Stories

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In Aereo's SCOTUS Hearing, Sides Appear Evenly Matched



HOW TO LEVERAGE DIGITAL MARKETING in the Healthcare Industry

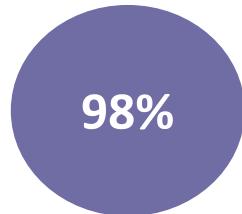
DOWNLOAD eBOOK

Market

- Take personalization beyond email
- Personalized experiences yield higher conversions and a better experience
- Personalization allows you to optimize ad spend and increase quality of prospects as well as acquire investors faster
- Personalization allows you to match content & messages to the stage of the buyers' journey

Nurture

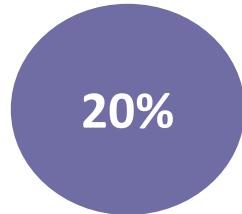
Why Nurture: Marketo Data



New Targets NOT Opp-Ready

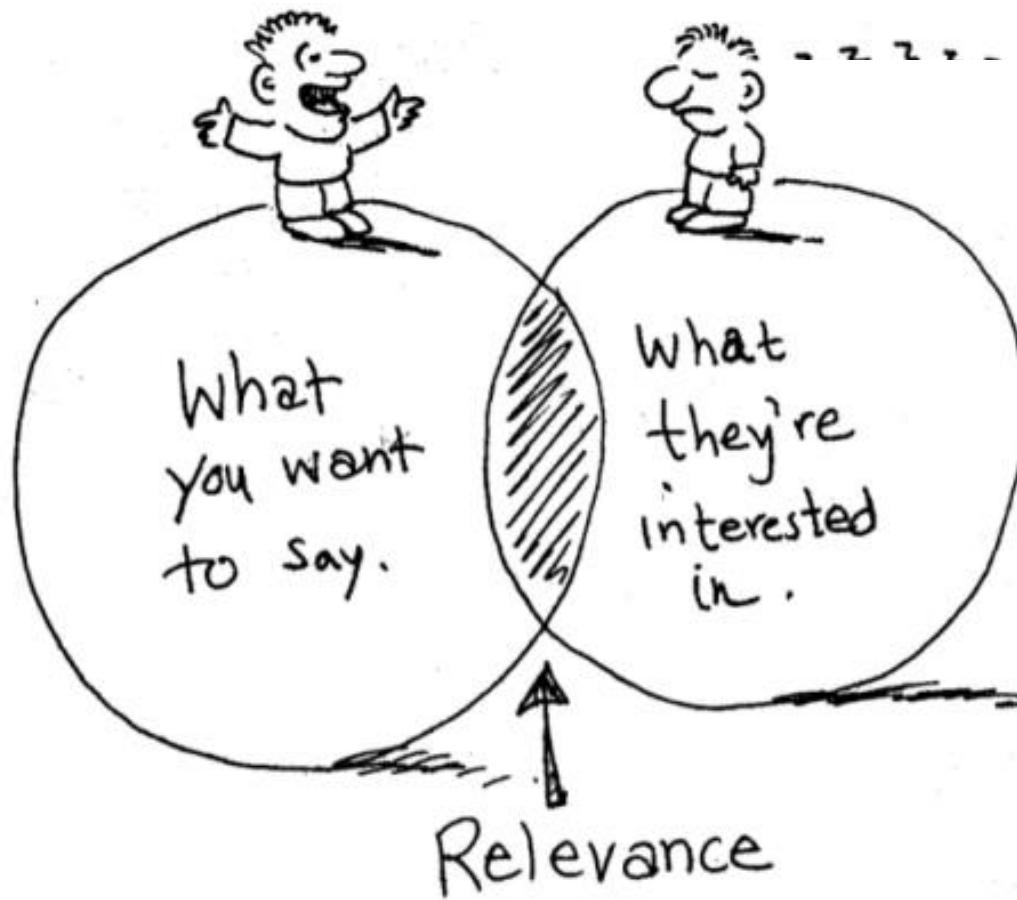


Average Target to Opp time



Increase in sales opportunities from nurtured leads versus non-nurtured

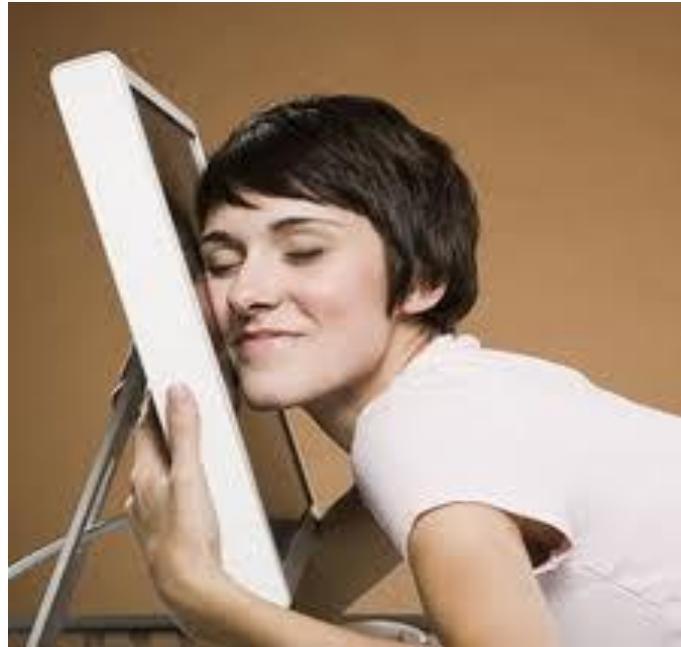
What Matters? Being relevant and personal



Bummer - too much, not relevant

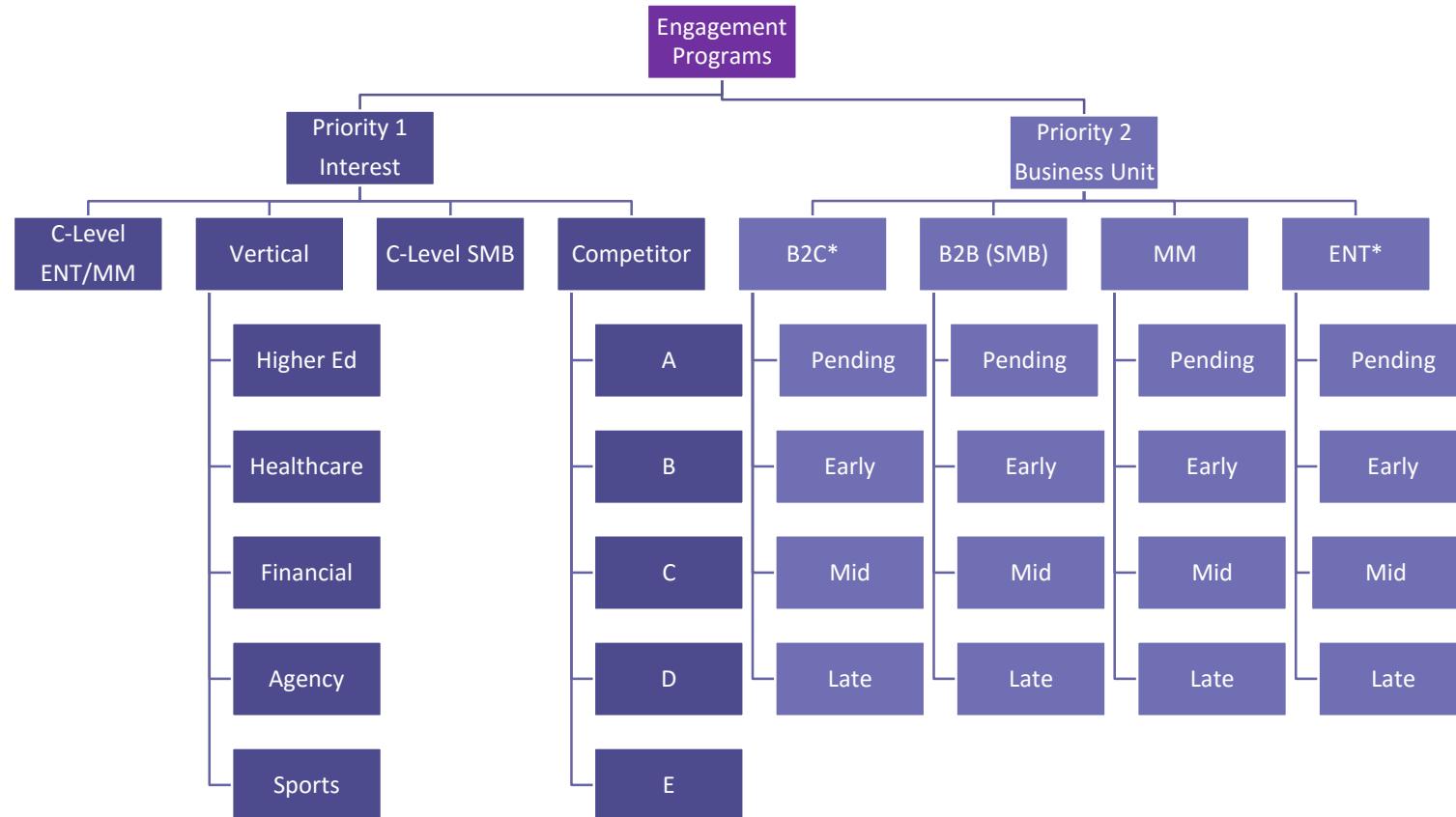


Ideal: Adjust, listen, respond

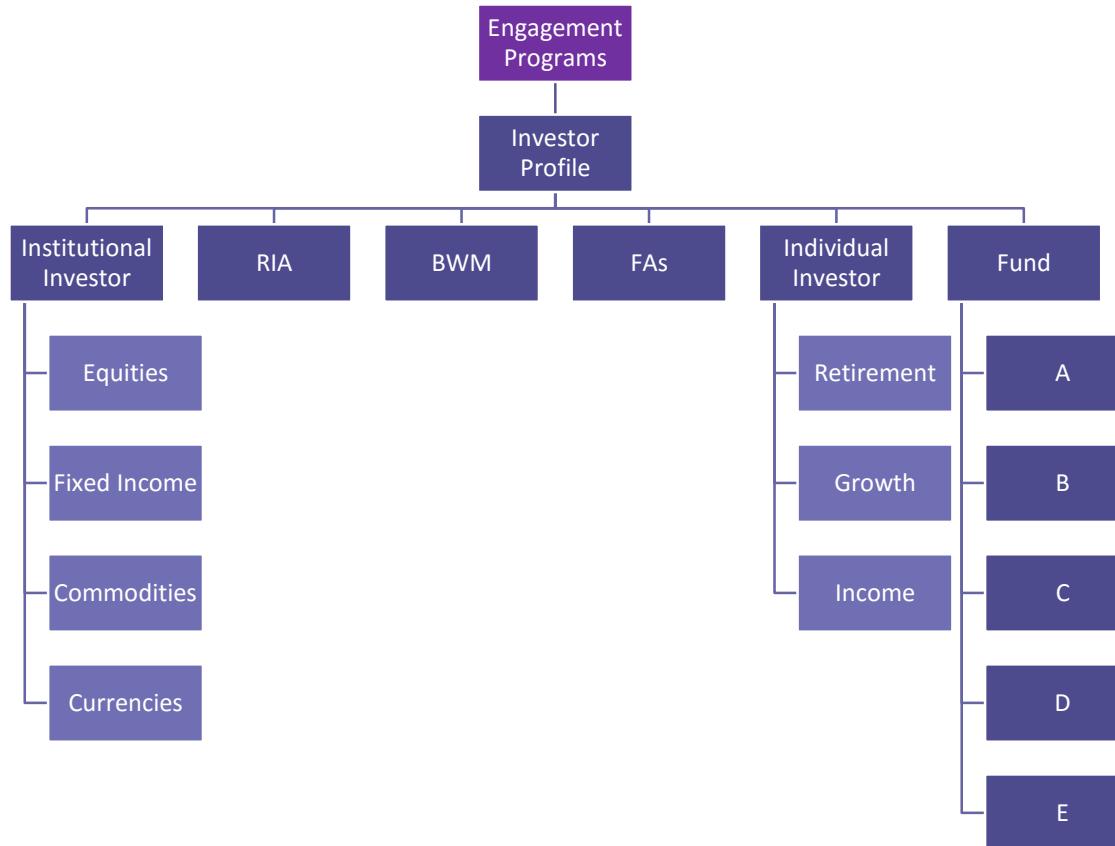


- Here's an interesting video
- Check out this article
- See our latest offering
- Share this with friends
- Here's what others like!
- Download our new book
- Happy birthday
- Join us at our event
- You like X, check out Y
- Fun ways to learn more
- Take this survey

Marketo NOAM Prospect Nurture Example



Investment Prospect Nurture Example

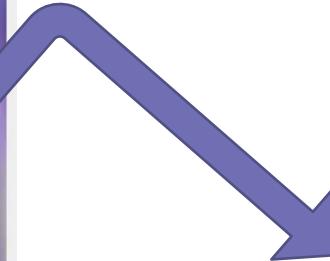


Marketo Example: Multi Channel Nurture



- We created custom audiences in Facebook and Twitter to then serve ads to these audiences in addition to Emails.
- The CTR on this multi-channel stream was **30-35%** higher resulting in a higher lead velocity and higher conversion to MQL and opps

Nurture with Triggered Accelerator



Hi Financial Services Marketer,

Thanks for checking out our Omni-Channel Experience eBook! To keep the momentum going, be sure to [download the 5 Principles of Engagement Marketing!](#)

Ready to learn how to supercharge your marketing strategy to grow AUM? [Click here](#).

If you have any questions, don't hesitate to reach out!

Best Regards,
The Marketo Team

[Read the ebook to learn how to:](#)

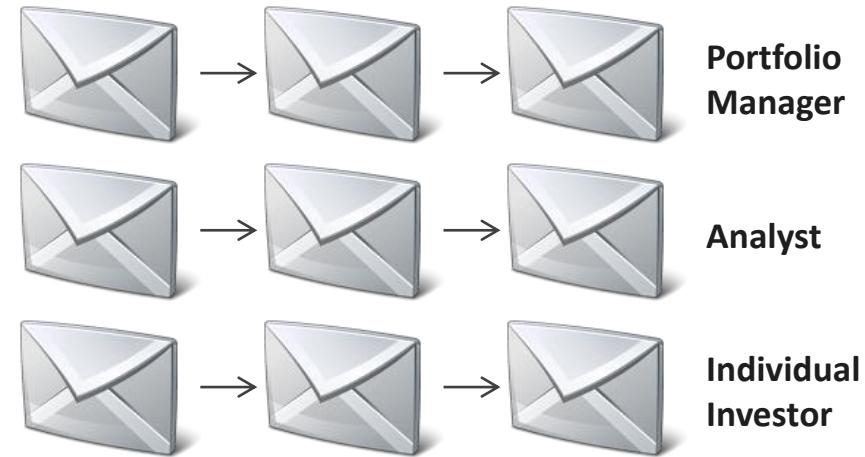
- Understand the cross-channel journey of your clients
- Align your firm to support a strong cross-channel strategy
- Choose the right technology to implement your plan

[DOWNLOAD NOW](#)

Triggers - Can Listen for Behavior



- Attends event
- Logs into mobile app
- Downloads content
- Click email
- Fills out form
- Score is changed
- Product interest
- Inactivity



Marketo Example: Triggered Accelerator

Goal: Target and convert leads who abandoned demo form pages on marketo.com

Results: 455 sent; ~\$500k in sales pipeline (over 4 months)

Hi there,

Noticed you've been interacting with Marketo's online content recently. Could I answer any questions?

Here are some additional resources I thought you would be interested in:

- [The Definitive Guide Collection](#) - The marketing guides you need to succeed, all in one place
- [Live Marketo Demo](#) - This demo will help you decide what you should be looking for in marketing software

What's the best way to get 15 minutes on your calendar in the coming days? If you would like me to contact you right away, [click here](#).

--The Marketo Team

	Standard Nurture	Triggered Interests	Lift
Open %	21.7%	34%	57%
Click to Open %	23.4%	37.1%	59%
Click %	5.1%	12.6%	147%

- Don't underestimate the value of nurture
- Make sure your nurture adds value and is not too salesy
- Start with email, expand to multi-channel
- Triggered emails are a great way to augment nurture

Lead Scoring

Use Lead Scoring

“Lead scoring is the shared sales and marketing methodology for ranking leads in order to determine sales-readiness”

1. Investor Fit
2. Investor Interest
3. Investor Behavior
4. Investor Stage and Timing



Reactive

Proactive and real-time



**Prioritizing your focus
towards the most important
clients and prospects**

Reactive

Proactive and real-time



Immediate Focus



Accelerate



Proactively Nurture



Reactive

Proactive and real-time

Scoring your prospects and clients



Searches



Visits Website



Downloads



Reads Email



Attends Events



Calls



Makes Investments



Score Your Prospects

- Score based on:
 - Demographic (fit)
 - Behavior (activity)
 - Decay (inactivity)
- Asset Range
- Investor Persona

Latent Behaviors (Engagement)	Active Behaviors (Buying Intent)
<ul style="list-style-type: none">• Investment Insights: +3• Attended Webinar: +5• Visit any Webpage: +1• Visit Careers Pages: -10• Decay Inactivity: -1, -5, -10	<ul style="list-style-type: none">• Fees Pages: +30• Investment Methodology: +20• Fact Sheet: +8• Prospectus: +12• "Contact Me": +50

Lead Score Formula

LEAD SCORE =

(Pos Demo Score²) - (Neg Demo Score²) + Behavior - Decay



Demographic scores reflect buyer fit

Measure of engagement with Marketo content

- Many companies are not leveraging a lead scoring model
- Determine which inputs (and at what weightings) make the most sense for your firm
- Use lead score to drive Sales prioritization

Measurement and Analytics

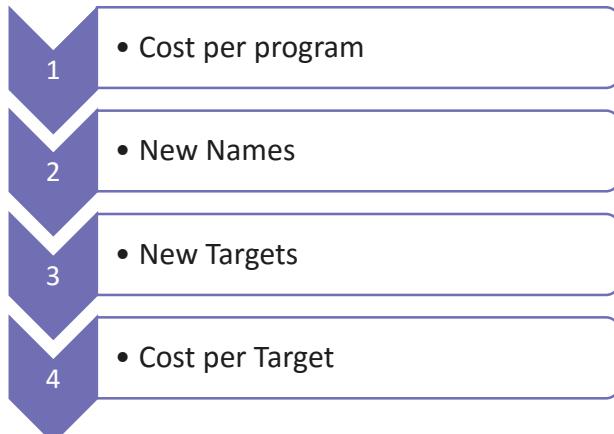
Why Do I Need the Right Marketing Metrics?

1. To do GREAT marketing you need to know what works (ROI)
2. Sales has to trust you (alignment)
3. It's your job to get the best return possible with your budget

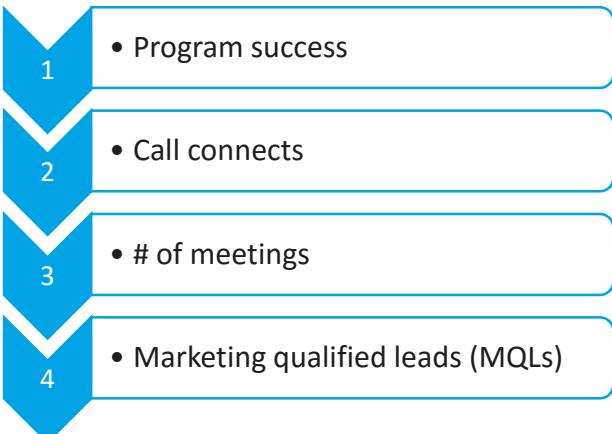
Know What To Measure When



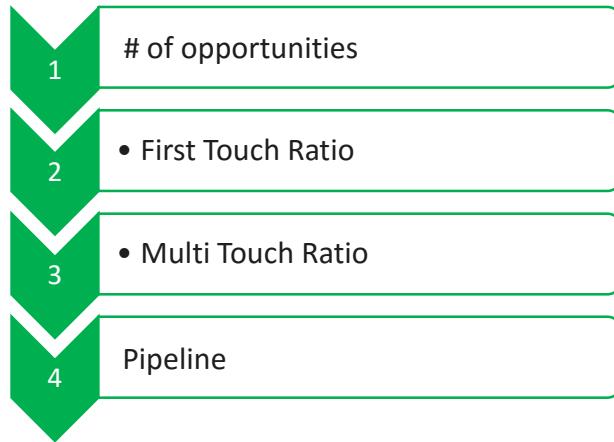
Early



Mid



Late



Measure What Matters Early

Layout

Rows: Campaign Channel, Campaign Name, Drop Level Here

Columns: Drop Level Here

Measures: Investment, Conversions, Success (Total), New Names, % New Names, Investment per New Name, Drop Measure Here

Properties

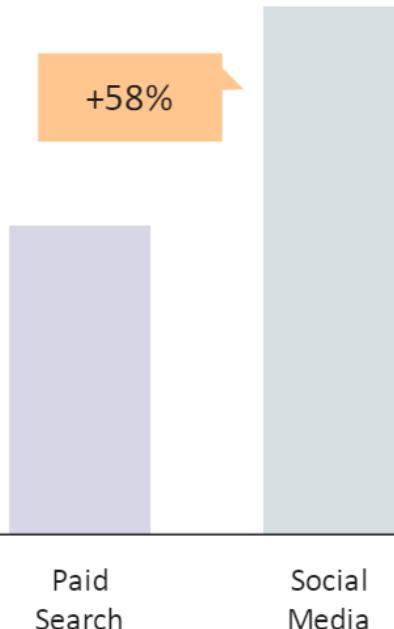
REPORT OPTIONS...

View As: List, Grid

Campaign Channel	Campaign Name	Investment	Conversions	Success (Total)	New Names	% New Names	Investment per New Name
Blog	Subscribers	0	250	130	120	48%	\$0
Social - Paid	Marketing Automation US	3,500	450	250	233	52%	\$15
	Marketing Automation EMEA	2,400	369	150	109	30%	\$22
	Content Marketing US	3,000	270	140	100	37%	\$30
	Content Marketing Japan	1,300	180	85	72	40%	\$18
PPC	Branded Terms US	10,000	520	240	222	43%	\$45
	Account Based Marketing EMEA	2,200	85	41	31	36%	\$72
	Content Marketing US	5,600	110	62	43	39%	\$130
	Competitive Keywords US	6,700	170	89	72	42%	\$93
Event - Tradeshows	Tradeshow 1	30,000	500	230	188	38%	\$160
	Tradeshow 2	22,000	330	170	105	32%	\$210
	Tradeshow 3	10,000	160	90	56	35%	\$180

Quality vs. Quantity

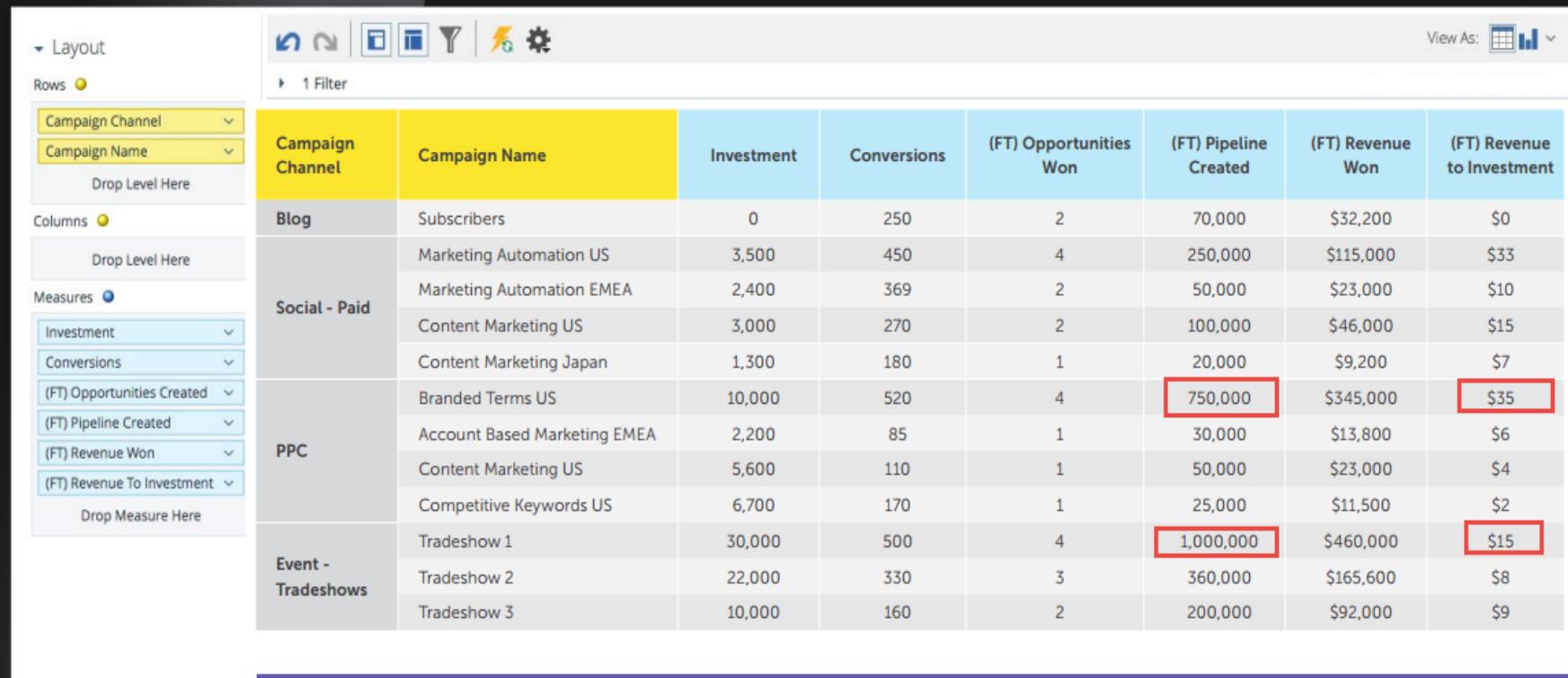
Leads



Opportunities



Measure What Matters Late



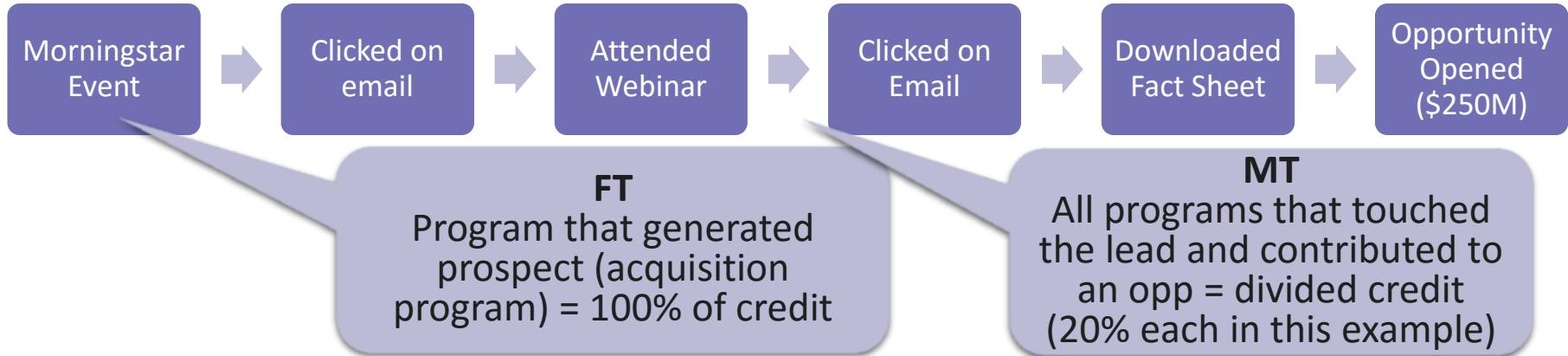
The screenshot shows a data visualization interface with a sidebar on the left and a main table on the right. The sidebar includes sections for Layout, Rows, Columns, and Measures, each with dropdown menus and a 'Drop Level Here' button. The main table has a header row with columns: Campaign Channel, Campaign Name, Investment, Conversions, (FT) Opportunities Won, (FT) Pipeline Created, (FT) Revenue Won, and (FT) Revenue to Investment. The data is categorized into three groups: Social - Paid, PPC, and Event - Tradeshows. The 'Social - Paid' group contains four rows: Marketing Automation US, Marketing Automation EMEA, Content Marketing US, and Content Marketing Japan. The 'PPC' group contains four rows: Branded Terms US, Account Based Marketing EMEA, Content Marketing US, and Competitive Keywords US. The 'Event - Tradeshows' group contains three rows: Tradeshow 1, Tradeshow 2, and Tradeshow 3. The 'Branded Terms US' row in the PPC group is highlighted with red borders around the 'Investment' and 'Revenue to Investment' columns. The 'Event - Tradeshows' group is also highlighted with a red border around its entire row.

Marketing Campaign Performance							
Rows		Campaign Data					
Campaign Channel		Campaign Name	Investment	Conversions	(FT) Opportunities Won	(FT) Pipeline Created	(FT) Revenue Won
Blog	Subscribers	0	250	2	70,000	\$32,200	\$0
Social - Paid	Marketing Automation US	3,500	450	4	250,000	\$115,000	\$33
	Marketing Automation EMEA	2,400	369	2	50,000	\$23,000	\$10
	Content Marketing US	3,000	270	2	100,000	\$46,000	\$15
	Content Marketing Japan	1,300	180	1	20,000	\$9,200	\$7
PPC	Branded Terms US	10,000	520	4	750,000	\$345,000	\$35
	Account Based Marketing EMEA	2,200	85	1	30,000	\$13,800	\$6
	Content Marketing US	5,600	110	1	50,000	\$23,000	\$4
	Competitive Keywords US	6,700	170	1	25,000	\$11,500	\$2
Event - Tradeshows	Tradeshow 1	30,000	500	4	1,000,000	\$460,000	\$15
	Tradeshow 2	22,000	330	3	360,000	\$165,600	\$8
	Tradeshow 3	10,000	160	2	200,000	\$92,000	\$9

FT vs. MT

- FT = First Touch
 - Acquisition Program = 100% of the credit
- MT = Multi Touch
 - Programs in between acquisition and opportunity = divided credit

Example customer journey: Acquisition Program → Opportunity



FT vs. MT Pipeline

More efficient at pushing investors through funnel

Channel	FT Pipeline	MT Pipeline
PPC	\$410,000	\$525,000
Webinars	\$220,000	\$903,000
Content Syndication	\$325,000	\$117,000

More efficient at acquiring the right investors

- Most marketers don't build programs with a data first approach
- Don't let early stage metrics drive your strategy
- First touch and multi touch metrics are both important, but for different reasons

Case Studies



- Implemented a “Digital Relationship Manager” strategy based on Marketo that helps them offer personalized communications to their clients based on their individual journey and needs
- Building long term relationships with their clients using Marketo as the backbone for all their client engagements
- Continuously enhancing the client profile based on their behaviors, needs and interactions



- **Acquiring and engaging their independent advisors**
- **Delivering personalized content that is most relevant to where advisors are in their business lifecycle**
- **Using segmentation to target advisors** based on their needs
- **Helping Sales prioritize the best prospects** by tracking and scoring advisors' behavior
- **Measuring success** by enabling direct attribution of marketing efforts

“Ultimately, Marketo is going to help marketing & sales to be more relevant and much more targeted in our efforts to acquire, retain, and grow relationships with independent advisors. By bringing marketing and sales together and making us more effective as a team, we can build a stronger program to meet advisor needs and achieve business results.”



– Mary Rosai, SVP of Institutional Services Marketing



Transform to attract, engage and retain your clients
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Thank you! Questions?

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