



- This child was 1 in 2011. She is now 6

Mobile Marketing for Asset Management

A New Way to Engage



Your Philosophy Matters

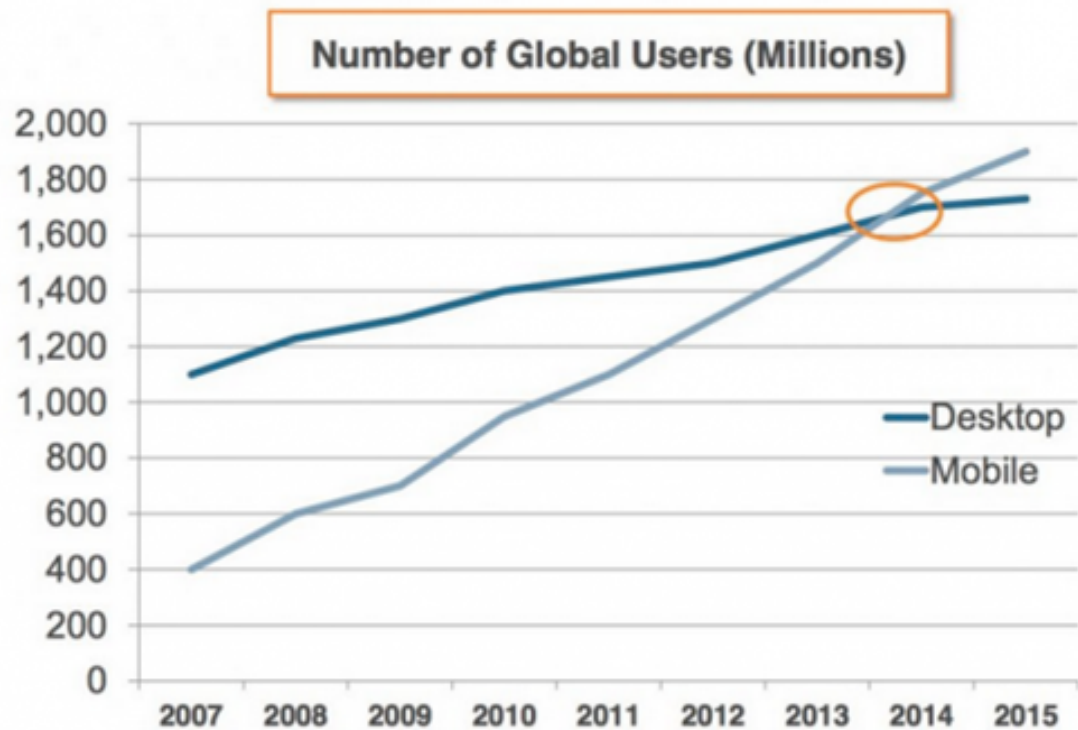
Lyceus Group serves the modern marketing needs of the investment management industry.

Wait, what do you do?

- **Public Relations**
- **Digital Marketing**
- **Copy Editing**
- **Thought Leadership**
- **Content Distribution**



The World Today

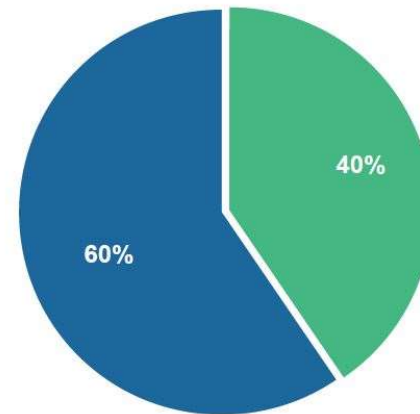


Brief History of Mobile Phone Usage

Mobile Phone Users – 1995 → 2014...
1% to 73% Population Penetration Globally

1995
80MM+ Mobile Phone Users
1% Population Penetration

2014
5.2B Mobile Phone Users
73% Population Penetration



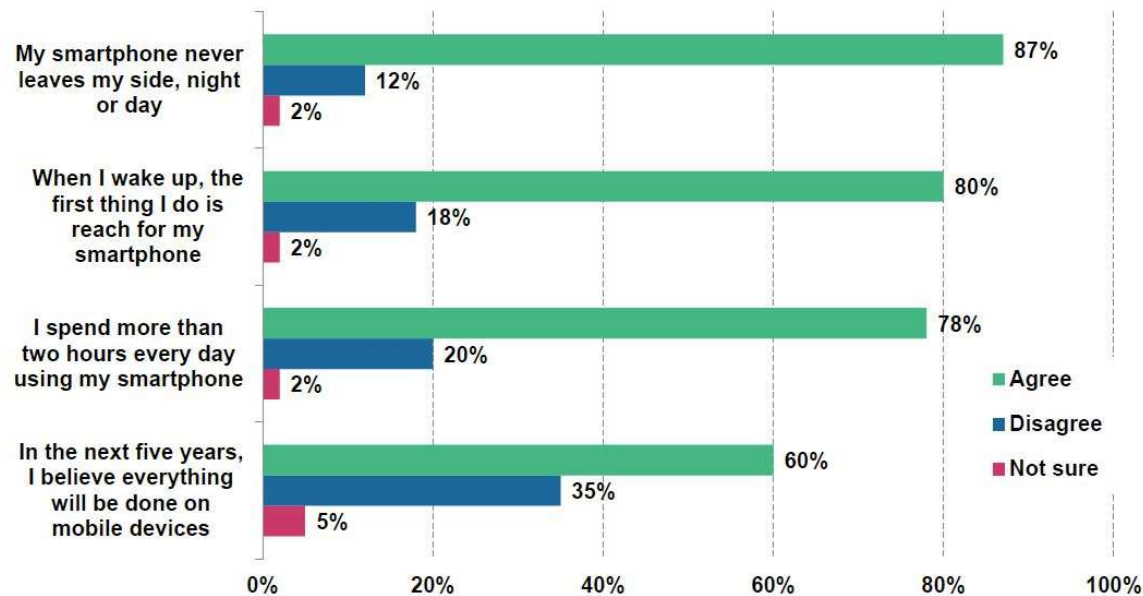
■ Smartphone ■ Feature Phone

Source: KPCB, Informa, World Cellular Information Service (WCIS). Assumes in 1995, one mobile phone subscription per unique user (no duplication). Note: In 2014, user base per KPCB estimates based on Morgan Stanley Research and ITU data. Smartphone users & mobile phone users represent unique individuals owning mobile devices; mobile subscribers based on number of connections & may therefore overstate number of mobile users.

Smartphones Usage

Millennials = Love Their Smartphones...
87% = 'Smartphone Never Leaves My Side'

Millennial Smartphone Behavior, USA, 2014

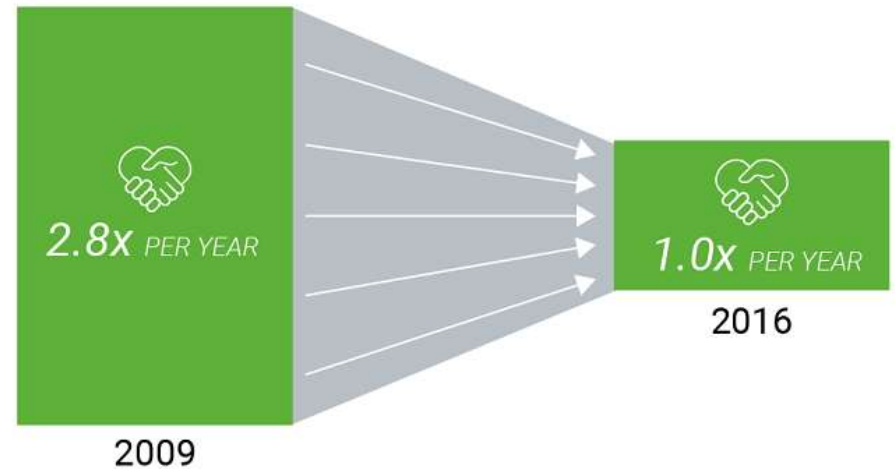


Source: KPCB. Zogby Analytics. Note: Zogby Analytics was commissioned by Mitek Systems, Inc. to conduct an online survey of 1,019 millennials who have a smartphone. For the purposes of this survey, "millennials" are defined as adults between the ages of 18-34. All interviews were completed May 30 through June 6, 2014. Sums may exceed 100% owing to rounding.

Human Interactions are in Decline

- Since 2009, the average number of face-to-face meetings per year between wholesalers and the advisors they support has declined from 2.8 to just 1.0 in 2016.
- The percentage of advisors whose perception of a firm's overall capabilities *is influenced by the digital experiences* provided by asset managers has increased significantly, from 58.7% in 2015 to 72.8% in 2016.

Frequency of advisor meetings has declined



© DST Kasina, LLC, 2016

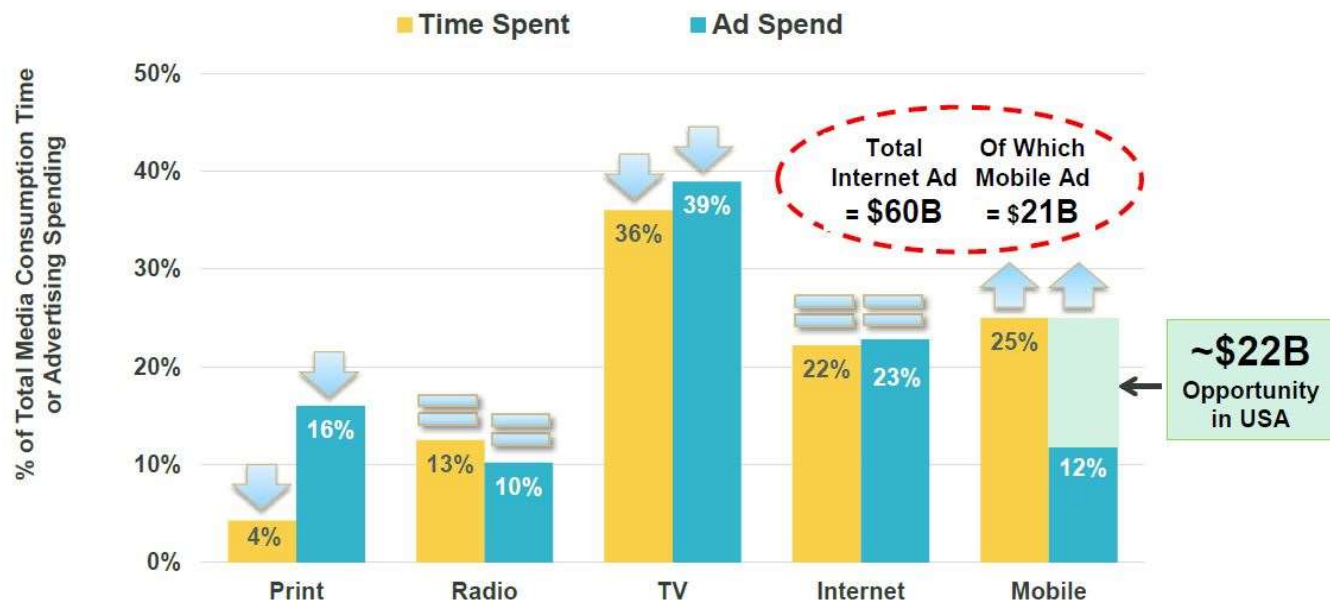
Where is the Alpha for Asset Managers?

- 73% of advisors said the digital experiences provided by asset managers influence their view of a firm's overall capabilities—an increase of 16 points from 2015.
- Only 16.3% of advisors tell Kasina that asset managers are meeting their digital expectations.

What Does Alpha Look Like?

Advertisers Remain Over-Indexed to Legacy Media

% of Time Spent in Media vs. % of Advertising Spending, USA, 2015



Source: KPCB. Advertising spend based on IAB data for full year 2015. Print includes newspaper and magazine. Internet includes desktop + laptop + other connected devices. ~\$22B opportunity calculated assuming Mobile ad spend share equal its respective time spent share. Time spent share data based on eMarketer 4/16. Arrows denote Y/Y shift in percent share. Excludes out-of-home, video game, and cinema advertising.

So What are My Options

PAID

- Banner display ads
- In-App
- Streaming (ads on Pandora)
- Videos
- Text
- Paid social ads
- Location-based/geo-targeting
- Sponsored content
- Public Relations

FREE-ish

- Mobile Responsive Website
- Email Campaigns
- Newsletters
- Content Creation
- Social Media
 - LinkedIn
 - Twitter
 - Facebook

Where to Start

- Is your website mobile responsive
- Are you emails mobile friendly
- Are email links mobile friendly
- Social Media
- Incorporate PR
- Are you monitoring via Google Analytics, Hubspot

Mobile-Friendly Test

https://www.queensroadfunds.com/

Not mobile-friendly

Page appears not mobile-friendly

- ✗ Text too small to read
- ✗ Mobile viewport not set
- ✗ Content wider than screen
- ✗ Links too close together

This page may appear not mobile-friendly because the robots.txt file may block Googlebot from loading some of the page's resources. [Learn how to unblock resources for Googlebot.](#)

If you've made sure Googlebot is not blocked, you can see [Pagespeed Insights](#) for more details on detected issues. [Learn more about the differences between the two tests.](#)

How Googlebot sees this page

This page uses 6 resources which are blocked by robots.txt.

Does this screenshot look incorrect? [Learn how to let Googlebot view the page correctly.](#)

Show resources



Mobile-Friendly Test

https://www.jenseninvestment.com/

Awesome! This page is mobile-friendly.

How Googlebot sees this page

This page uses 5 resources which are blocked by robots.txt.

Does this screenshot look incorrect? [Learn how to let Googlebot view the page correctly.](#)

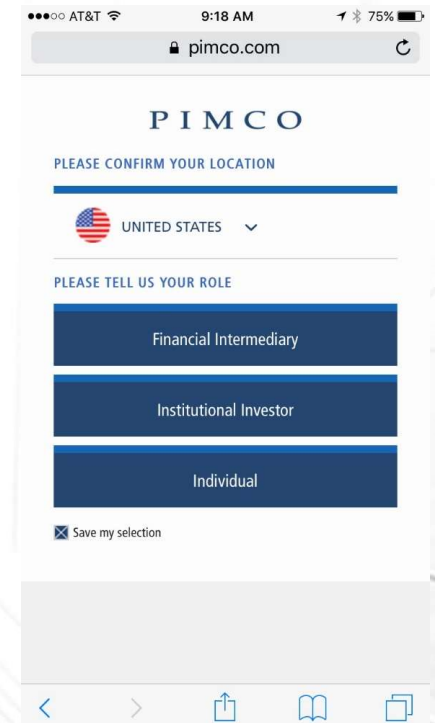
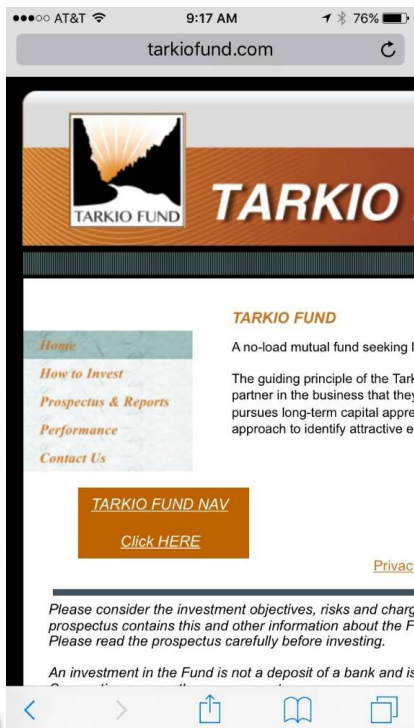
Show resources



Learn more about mobile-friendly pages

If you're interested in learning more about mobile sites, check out our [Webmaster's Mobile Guide](#) or the [Principles of Site Design](#) on Web Fundamentals.

Mobile Websites: Responsive?



Customized Content

PLEASE CONFIRM YOUR LOCATION

UNITED STATES

AMERICAS

Brazil
 Canada
 Latin America
 United States

ASIA PACIFIC

Australia
 Hong Kong
 Japan
 Singapore

EUROPE

Belgium
 France
 Italy
 Netherlands
 Switzerland
 Europe
 Germany
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 Spain
 United Kingdom

Location not listed? Visit our Global site

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HOW THE ELECTION COULD CHANGE THE ECONOMY

With U.S. government spending representing about one fifth of GDP, a new president can have a significant impact on economic activity.

The election and the economy

Mutual Funds
[Quick fund links](#)

Partnerships and sponsors
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Putnam FundVisualizer®
 New feature! Import fund data from your spreadsheets.

Financial advisors:

FundVisualizer®

Stay ahead of the game with this powerful, free analysis tool – now with correlation reports.

Download the app or use now:

Our commitment to performance excellence

Putnam Investments is proud to partner with world-class athletes, teams, and organizations who share our:

- Belief in teamwork
- Dedication to winning
- Focus on performance

NEW ENGLAND PATRIOTS

BOSTON CELTICS

TED LIGETY & U.S. SKI AND SNOWBOARD ASSOC.

KEEGAN BRADLEY
 BRENDAN STEELE
 JON CURRAN

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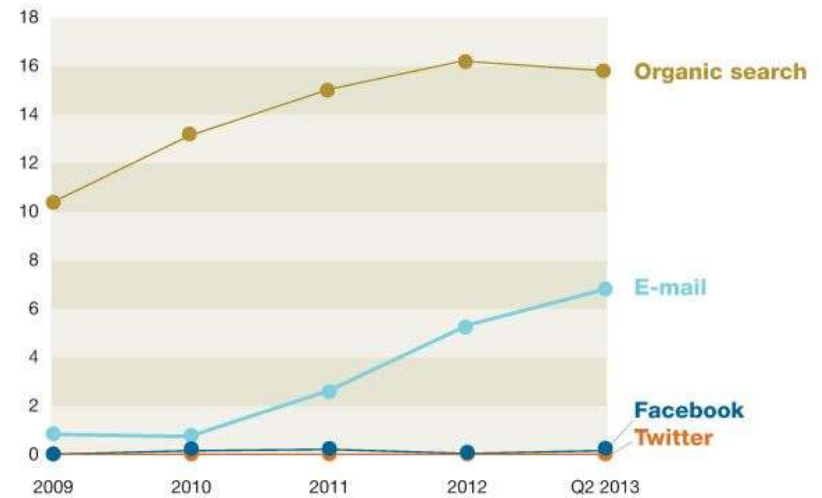
Email Marketing. A Glimpse.

- By 2018, 8 in 10 email users will likely access their email accounts exclusively from their mobile devices.
- Mobile email opens have grown by 180% in the last three years.

Source: Impactbnd.<https://www.impactbnd.com/blog/mobile-marketing-statistics-for-2016>

E-mail is still a significantly more effective way to acquire customers than social media.

US customer-acquisition growth by channel,
% of customers acquired



Source: Custora, *E-Commerce Customer Acquisition Snapshot*, 2013; McKinsey iConsumer survey, 2012

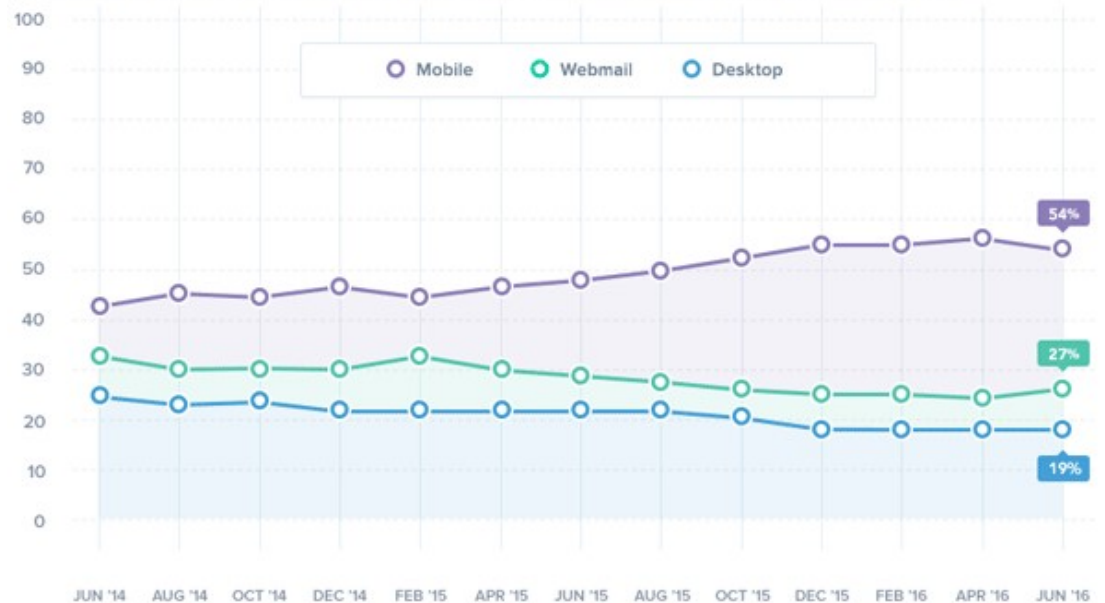
Email Marketing Tips

- Be as concise as possible in both design and content
- Use a single column template
- Use a single, clear call to action
- Avoid tiny fonts
- Take it easy on images
- Use a template

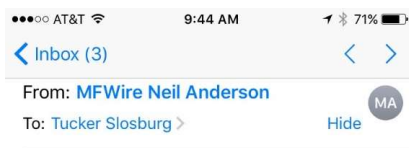
• Source: Constant Contact, 5 Simple Tips for Mobile-Friendly Emails, <https://blogs.constantcontact.com/mobile-friendly-emails/>.

Most emails are opened on mobile devices

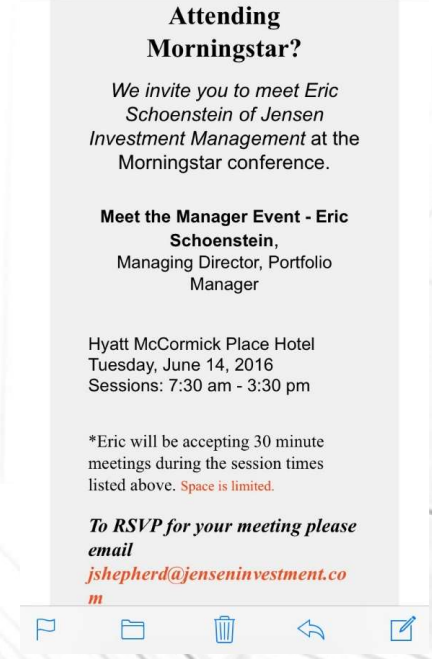
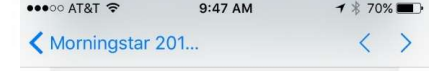
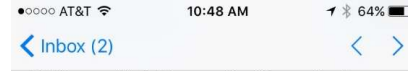
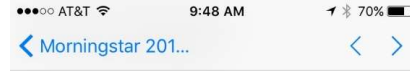
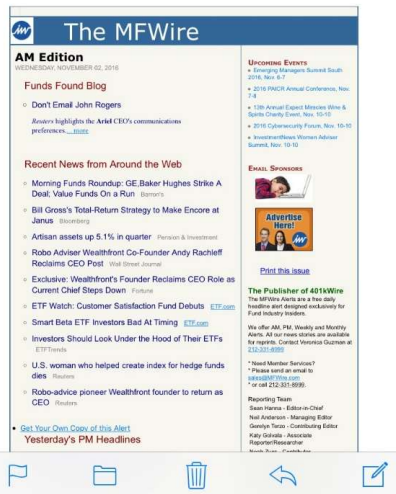
According to more than 1 billion email opens each month tracked by Litmus' Email Analytics



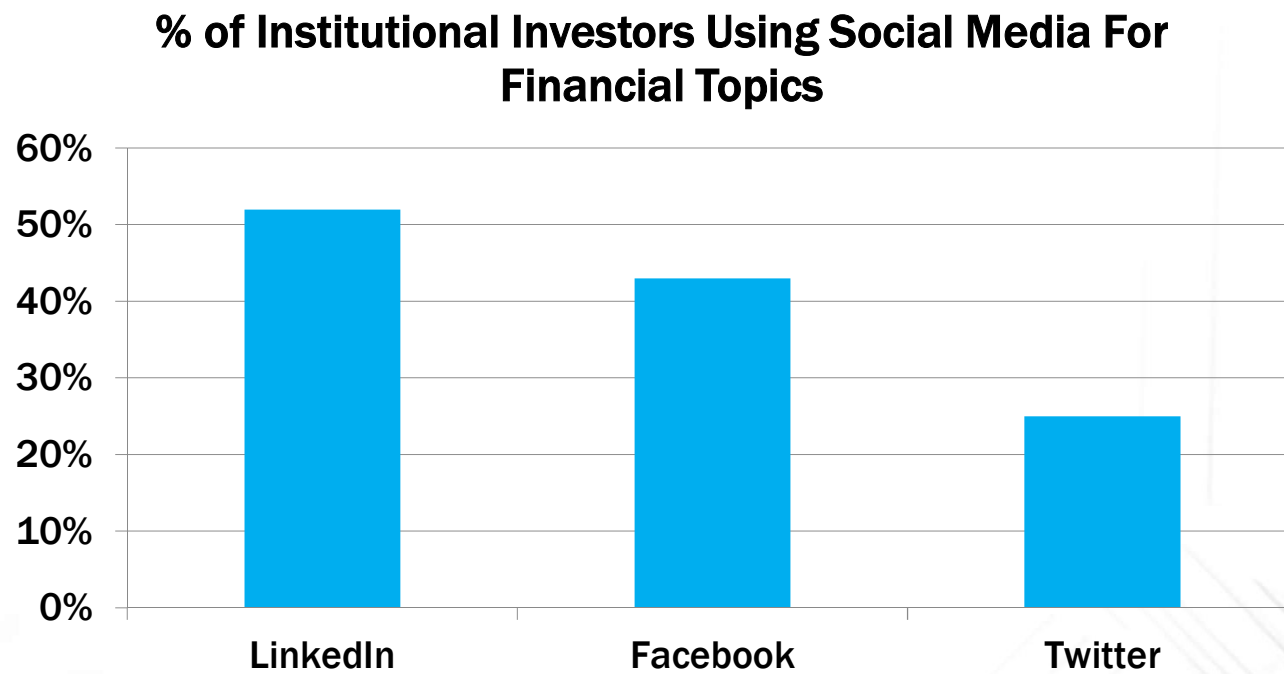
Email Marketing: (font) Size Matters



MFWire AM Alert: Don't Email John Rogers
Today at 5:28 AM

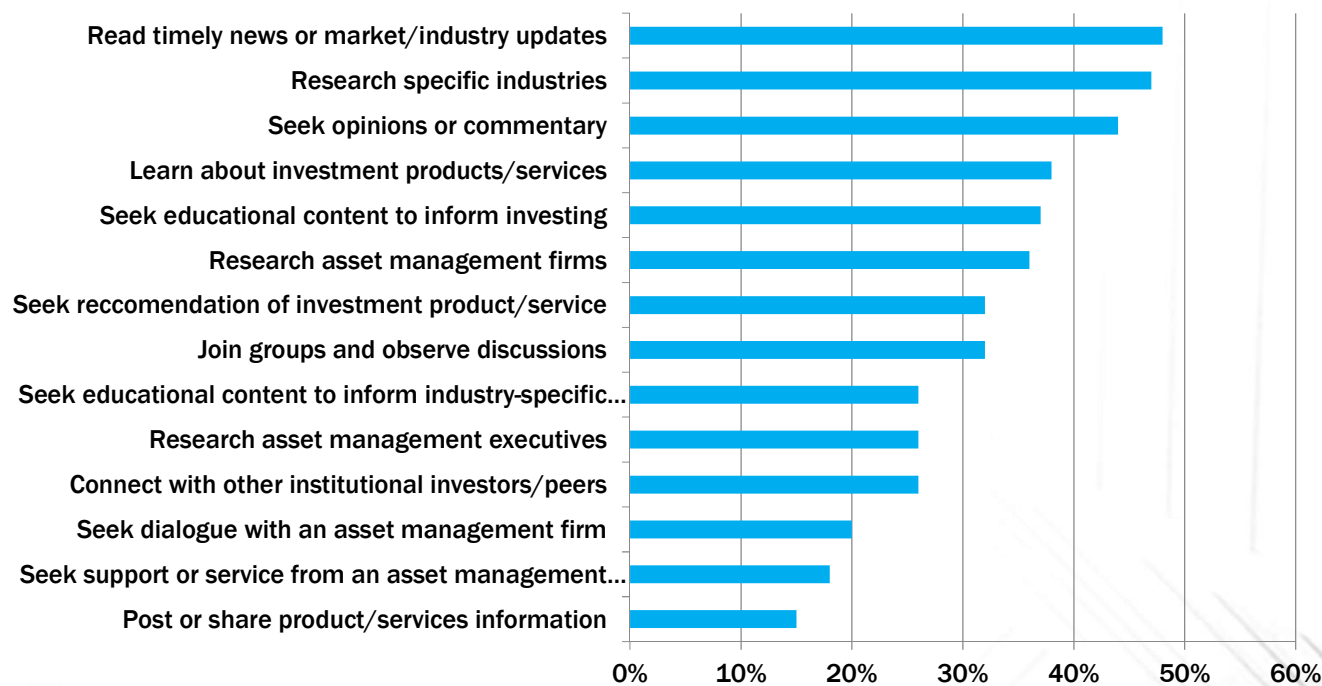


Are Investors Using Social Media?



Source: Greenwich Associates. *Institutional Investing in the Digital Age: How Social Media Informs and Shapes the Investing Process.*

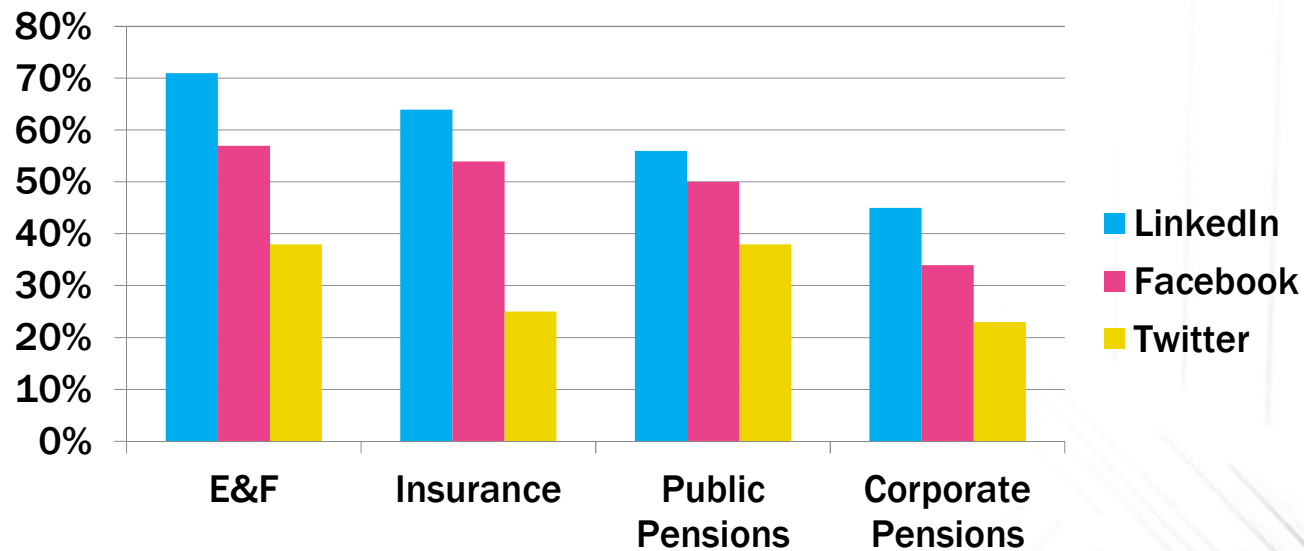
Why Do Investors Use Social Media?



Source: Greenwich Associates. *Institutional Investing in the Digital Age: How Social Media Informs and Shapes the Investing Process.*

Who Are The Investors?

"At Least Monthly" Users Of Social Media For Financial Topics By Institution Type



Source: Greenwich Associates. *Institutional Investing in the Digital Age: How Social Media Informs and Shapes the Investing Process.*



Which Managers Are Optimizing Their LinkedIn Presence?

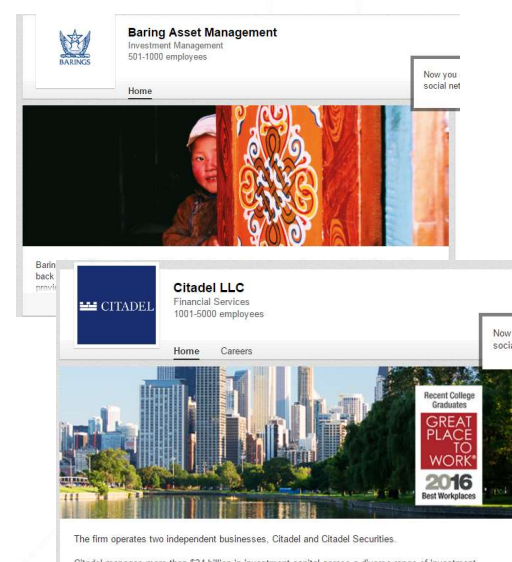
Using Rich Media



Using Showcase



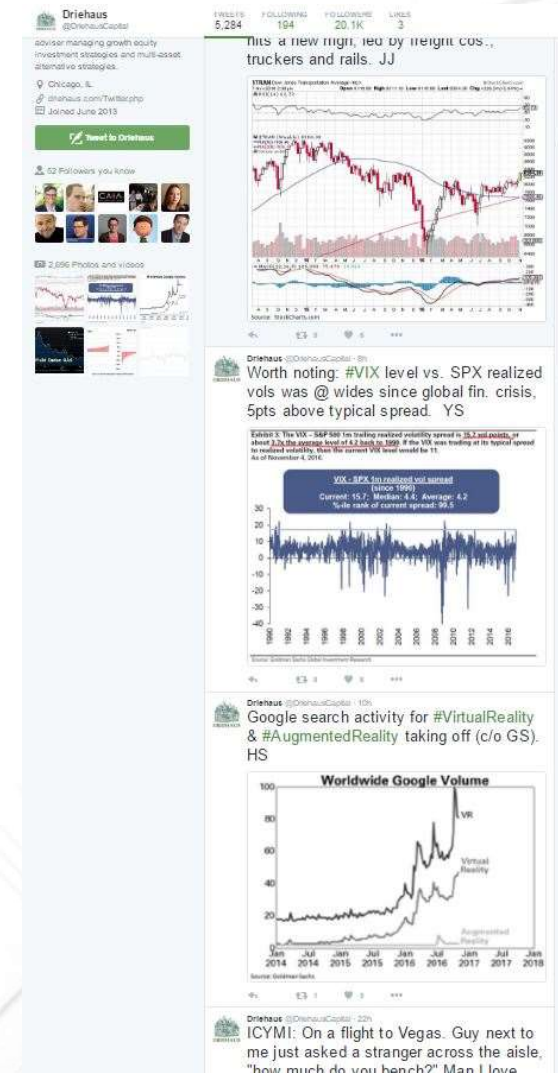
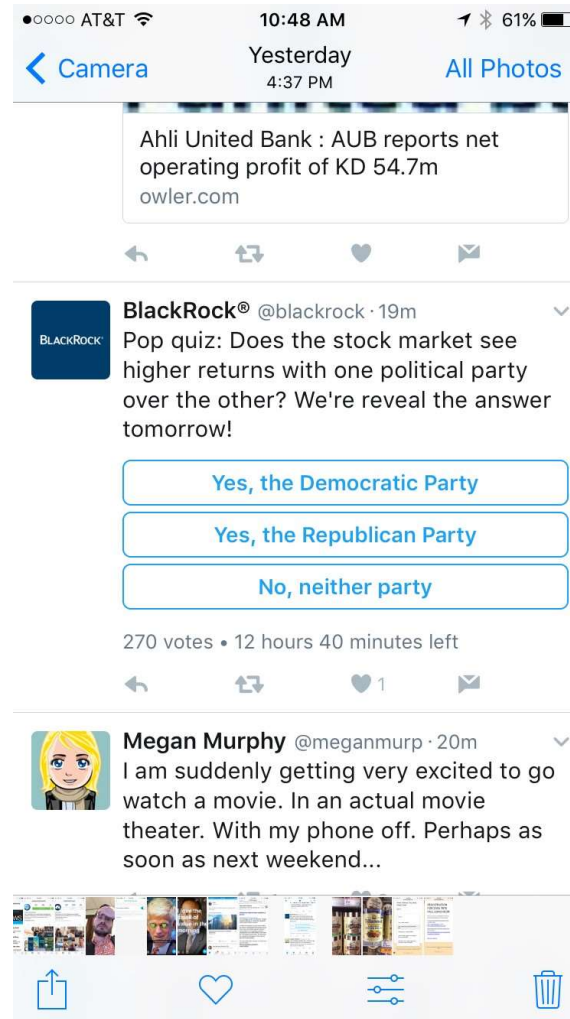
Using Own Content



Source: Kurtosys. Social Media for Asset Managers Series: LinkedIn, April 23, 2015

Twitter. Do I Have To?

- Requires planning
- Time consumer
- Great for PR
- Charts are your friend
- Make friends with Compliance



Public Relations in Social Media



The Most Influential Managers on Twitter

Top 20	
Deutchse Bank	Allianz
Goldman Sachs	New York Life
Wells Fargo	Citi
Morgan Stanley	CBRE
Credit Suisse	J.P. Morgan
UBS	DWS Investments
Merrill Lynch	USAA
Prudential	State Street
The Hartford	BlackRock
Putnam Investments	BMO

Source: Kurtosis Power 100: The Most Influential Asset Managers on Twitter.

How are they doing it?

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*Not all features available on all platforms.

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Untested Social Media



Instagram

- Few Asset Managers
 - Compliance Concerns
 - ROI?
-
- But why not a pic of the office?
 - A pic of a chart you like?



How People Use Filters Now

Branded Snapchat Lenses & Facebook Filters...
Increasingly Applied by Users

Taco Bell Cinco de Mayo Lens
224MM Views on Snapchat
5/5/16



Gatorade Super Bowl Lens
165MM Views on Snapchat
2/7/16



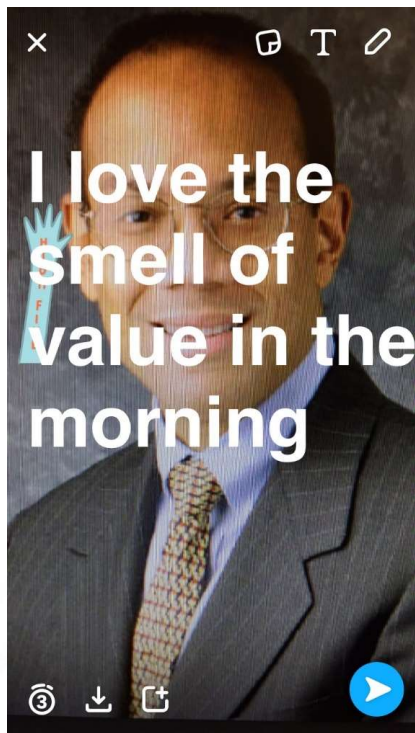
Iron Man Filter from MSQRD
8MM+ Views on Facebook
3/9/16



Average Snapchatter Plays With Sponsored Lens for
20 Seconds

Source: Snapchat, Facebook Time on sponsored lens excludes time taking and uploading image / video

Could Asset Managers Use Filters?



Snapchat

- Wide open
- Compliance
- ROI

Why not

- Pic of team having fun
- Goofing off before going on air

Investors want to feel part of the club.



ROI to Social Media Marketing

- Think building brand awareness AND building trust
- Three in four American consumers say social media influences their buying decisions.
- A whopping 80% of consumers are more likely to trust a company with a CEO who is active on social media.
- 78% of employees would rather work for an organization helmed by a CEO who leverages social media.

Source: <http://www.thinkadvisor.com/2016/10/19/3-powerful-benefits-financial-company-ceos-realize>



“That’s great but I gotta sell this back in the home office, so throw me a bone.”

- **Mobile responsive website**

- Test it
- If fail, fix it—worth the cost:
- According to Mickinsey & Co: Google says 61% of users are unlikely to return to a mobile site they had trouble accessing and 40% visit a competitor’s site instead.

- **Mobile responsive emails/newsletters**

- Find a template
- Test font
- Be selective on images

- **Targeted use of social media**

- Start with LinkedIn
- Feed with content you already generate
- Test run other platforms

Questions?

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Tucker Slosburg

206.652.3206

tslosburg@lyceusgroup.com