

Services

Our services are tailored to drive success at investment management firms through an active, hands-on approach. Rather than sitting on the sidelines, we partner closely with each client getting to know the organization's strengths, challenges and goals.

MARKETING STRATEGY

DEVELOP STRATEGIES FOR SUCCESS

- ▶ **BRAND EVALUATION:** Conduct internal and external interviews and analysis to determine brand awareness, opinions and effectiveness in the marketplace.
- ▶ **PRODUCT, CHANNEL AND COMPETITOR ANALYSIS:** Assess overall capabilities and individual products to identify marketplace channels and segments for priority focus. Evaluate environment relative to firm's strengths and weaknesses to arrive at most competitive position to grow and sustain client base.
- ▶ **MARKETING TOOLS, TECHNIQUES AND PLANNING:** Construct a comprehensive, viable marketing plan, incorporating firm's strengths and weaknesses, as well as opportunities and threats in the marketplace. Recommend targeted marketing tools and techniques to maximize overall success.

MARKET EXPANSION

EXPAND BUSINESSES STRATEGICALLY

- ▶ **PRODUCT, CHANNEL AND DISTRIBUTION EVALUATION:** Analyze product offering for suitability to expand and thrive in new channels. Evaluate attractiveness of distribution capabilities in various markets.
- ▶ **RESOURCE ASSESSMENT:** Assess resources across functions for readiness to enter into and operate effectively in different markets.

MARKETING SUPPORT

CREATE COMPELLING MATERIALS AND MESSAGES

- ▶ **MARKETING COMMUNICATIONS AND EDITORIAL SERVICES:** Develop and implement customized marketing communications programs and materials, including strategic direction, copywriting and editing.
- ▶ **DESIGN — GRAPHIC AND WEB SITE:** Design tailored print materials and web sites, including web site programming and maintenance.
- ▶ **DATABASE POPULATION AND RFP PRODUCTION:** Write and develop mandate-winning RFPs, and populate and maintain consultant databases.

SALES AND CLIENT RETENTION

GROW AND RETAIN CLIENTS

- ▶ **SALES**
 - **Prospecting and Cross-selling Strategy:** Assess effectiveness of prospecting and cross-selling approaches; and provide strategic and tactical direction to augment marketing and sales efforts.

SALES and CLIENT RETENTION

GROW AND RETAIN CLIENTS (continued)

- **Meeting and Presentation Direction:** Review both written and verbal presentations for content, style and delivery. Analyze sales meeting approach and structure, and offer guidance to maximize effectiveness. Evaluate results of sales meetings, and offer adjustments to improve new client closing rate.
- **One-on-One Coaching and Personnel Evaluation:** Conduct personalized coaching with sales team members to identify strengths and challenges then coach them for optimal performance.

▶ CLIENT RETENTION

- **Client Satisfaction Analysis:** Survey clients to determine satisfaction and identify at-risk clients. Analyze reasons for dissatisfaction to identify potential areas of weakness, and offer suggestions for corrections.
- **Client-specific Retention Strategy:** Customize strategy to both retain and grow assets.

INSURANCE ASSET MANAGEMENT

GATHER INSURANCE CLIENTS

- ▶ **MARKET, PRODUCT, SERVICE AND CHANNEL ANALYSIS:** Assess firm's overall capabilities for success in the insurance marketplace, and recommend accurate product, market and channel positioning.
- ▶ **FIRM STRUCTURE AND RESOURCE ASSESSMENT:** Evaluate overall firm structure and resources for success in the insurance marketplace, and propose changes and enhancements to improve level of success.

EXECUTIVE DEVELOPMENT

CULTIVATE EFFECTIVE LEADERS

- ▶ **EXECUTIVE COACHING:** Coach marketing and sales executives in techniques to improve communication skills, increase overall effectiveness and achieve desired success.
- ▶ **GROUP FACILITATION – EXECUTIVE DISCUSSION AND OFFSITE MEETINGS:** Facilitate both discussions among executives to reach actionable outcomes, and team offsite meetings to advance initiatives and drive results.

ORGANIZATIONAL STRUCTURE

BUILD HIGH-PERFORMANCE FIRMS

- ▶ **STRUCTURE, RESOURCE AND EMPLOYEE COMPENSATION ANALYSIS:** Examine effectiveness and efficiency of firm structure and resources, including staff compensation.
- ▶ **TEAM AND FUNCTIONAL INTEGRATION:** Analyze integration of firm's team functions for consistent communications, efficient operations and improved results.

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