

How do we control our clients' perception of internal change?

How do we control our clients' perception of internal change?

A nationally-distributed mutual fund company was in the process of internal reconstruction. Without a large wholesaling staff to control the perception of these changes, the company was seeking solutions to the challenge of gaining greater overall visibility as fast as possible.

How do you increase your brand and control your image in the marketplace? While the answer may seem straightforward - proactive, strategic marketing - the execution is not. In light of limited internal resources, Harborside was engaged to create a customized marketing plan designed to better communicate the internal changes and to enhance the company's overall market image.

A targeted public relations campaign was developed, whereby Harborside professionals wrote and nationally disseminated press releases, and prospected public news services for greater coverage and exposure. Within five weeks following major portfolio changes, Harborside was successful in arranging seven interviews with industry publications, including a featured mutual fund article in The Wall Street Journal and a portfolio manager appearance on CNBC.

To assist their small internal wholesaling team, Harborside developed custom marketing materials that featured the benefits of the firm's recent changes. Research-based product materials focused on the unique processes of the new portfolio management teams, the enhanced positioning of the fund offerings, and product-specific, client-approved sales ideas. Materials were designed for both gatekeepers and financial advisors which allowed their sales professionals to focus on what they do best - selling.

Result: Increasing visibility requires a proactive approach.

A coordinated strategy of marketing and public relations will help to direct your clients' perception of change, rather than allowing them to make conclusions that could be otherwise damaging to a company's image. In these cases, change equates an opportunity to communicate the benefits of your firm, products and services and increase brand awareness.

HARBORSIDE SALES GROUP

helps asset managers grow sales and retain assets. Whether it is product structure, sales focus or marketing efforts that are keeping sales from reaching new levels, our experienced professionals can help. We provide a focused array of services that span distribution consulting, strategic sales support, marketing and market research.

Let Harborside help you to better reach your target audience and deliver more effective product and service solutions.

Change equates an opportunity to communicate the benefits of your firm, products and services and increase brand awareness.



HARBORSIDE SALES GROUP