

# The New Sale

**10.06.20**

**10AM EST**

# Business Operations

**10.13.20**

**10AM EST**

# Dynamic Marketing

**10.20.20**

**10AM EST**

# Global Allocators

**10.27.20**

**10AM EST**





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# Sales: Looking Forward

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Matthew Mccue, FIN News





# 2020: Is It Over Yet?

**COVID-19 Changes Game,  
Does Election Change Players?**

ALLOCATORS HAVE SHIFTED FOCUS FROM LIQUIDITY AND CASH MANAGEMENT TO FINDING RETURN OPPORTUNITIES.

# Where Have We Been?

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## Active Vs. Passive

- Focus on Fees
- Fewer Relationships

## Push Into Alternatives

- PE Sees Extraordinary Growth
- Real Estate Evolves Beyond Core
- Hedge Funds Lose Steam

# Where Are We Going?

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## Volatility Creates Opportunities

- Will Hedge Funds Benefit?
- Passive Riskier With Heavy Tilts?

## Search For Returns

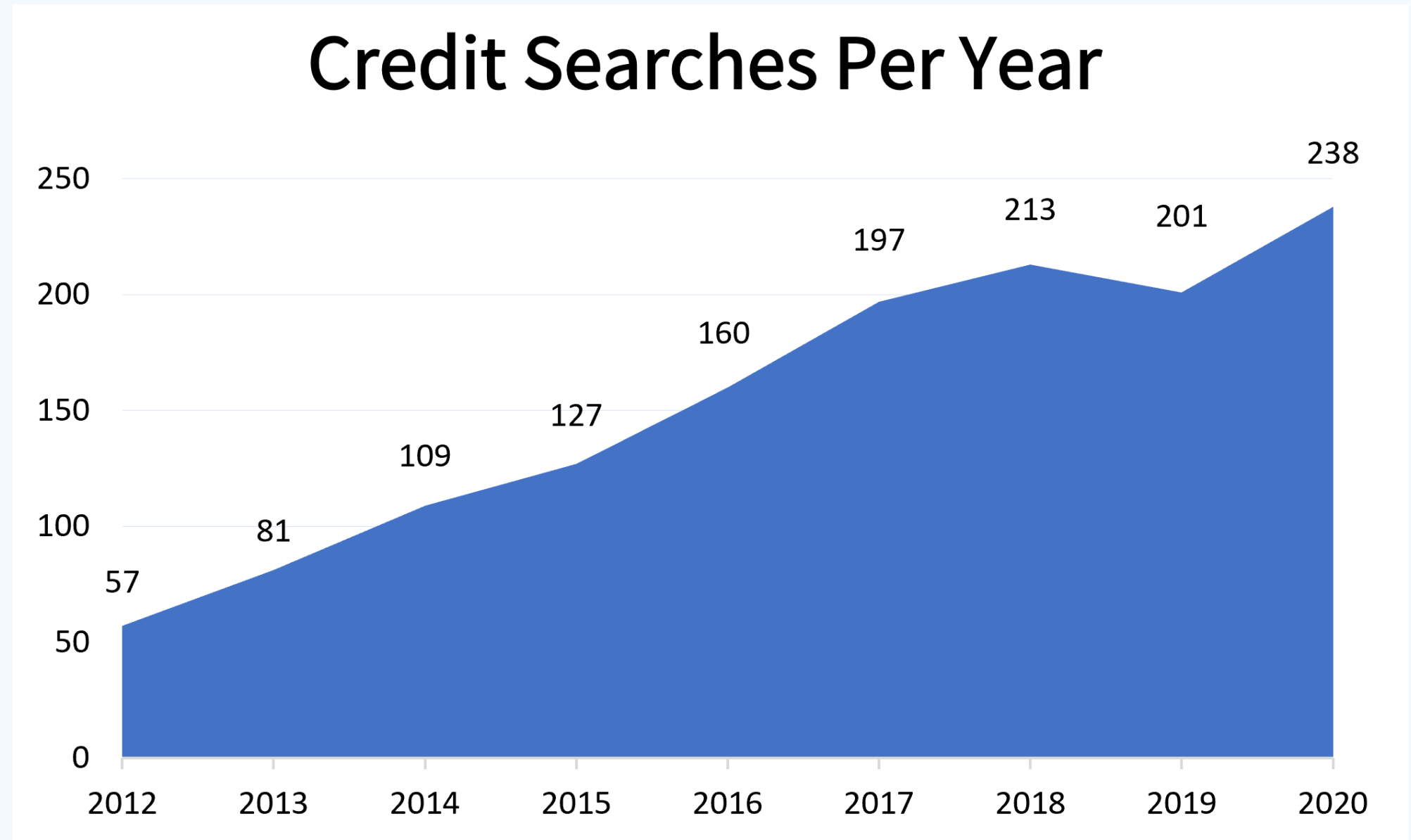
- Fixed-Income Offers Little To Reach Target Markets
- Private Credit Sees Increased Interest
- Non-Core Real Estate Offers Potential As Large Core Funds Struggle

## Growth Vs. Value

- When Does It Shift?

# Credit Interest Continues To Grow

- Plans Making Dedicated Allocation
- Increase In Specialized Consultant Mandates



# Other Issues

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## Customize Your Pitch

- With less travel, there is more time to show potential clients you have done your homework on them
- Help them understand the issues
- Know your competitors

## Diversity

- How to access diverse-owned managers
- Increased focus on diversity data at all firms—know your data

## ESG

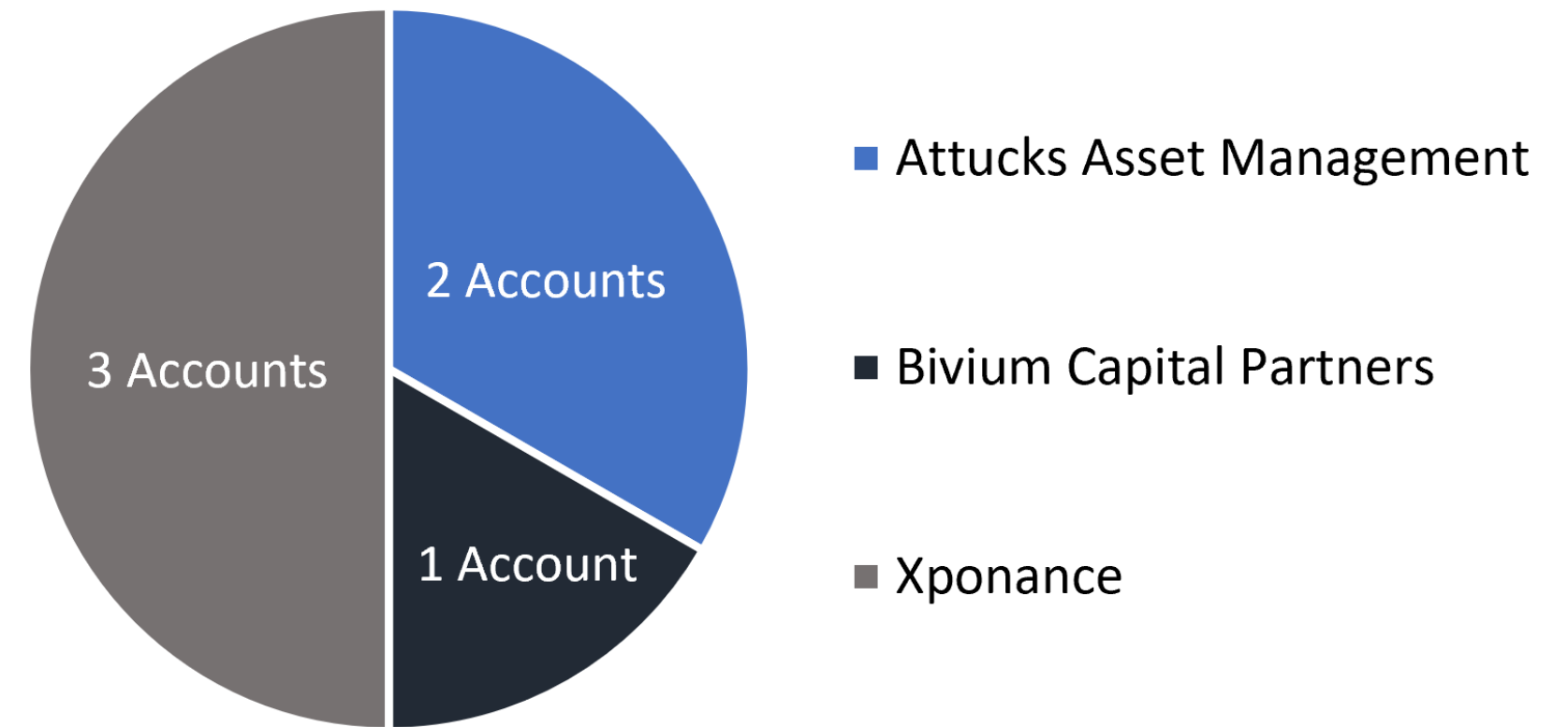
- Investors' due diligence evolving
- Positive vs. negative screening
- Social and governance gaining prominence



# Emerging Manager- of-Managers Business Shifts

- Largest MoM Progress Investment Management Company closed
- Firms handled approximately \$5.3B in assets when it announced it was closing
- Among public fund clients, most have remained committed to the emerging manager space, although how has varied

Who Benefitted From Progress Closure?



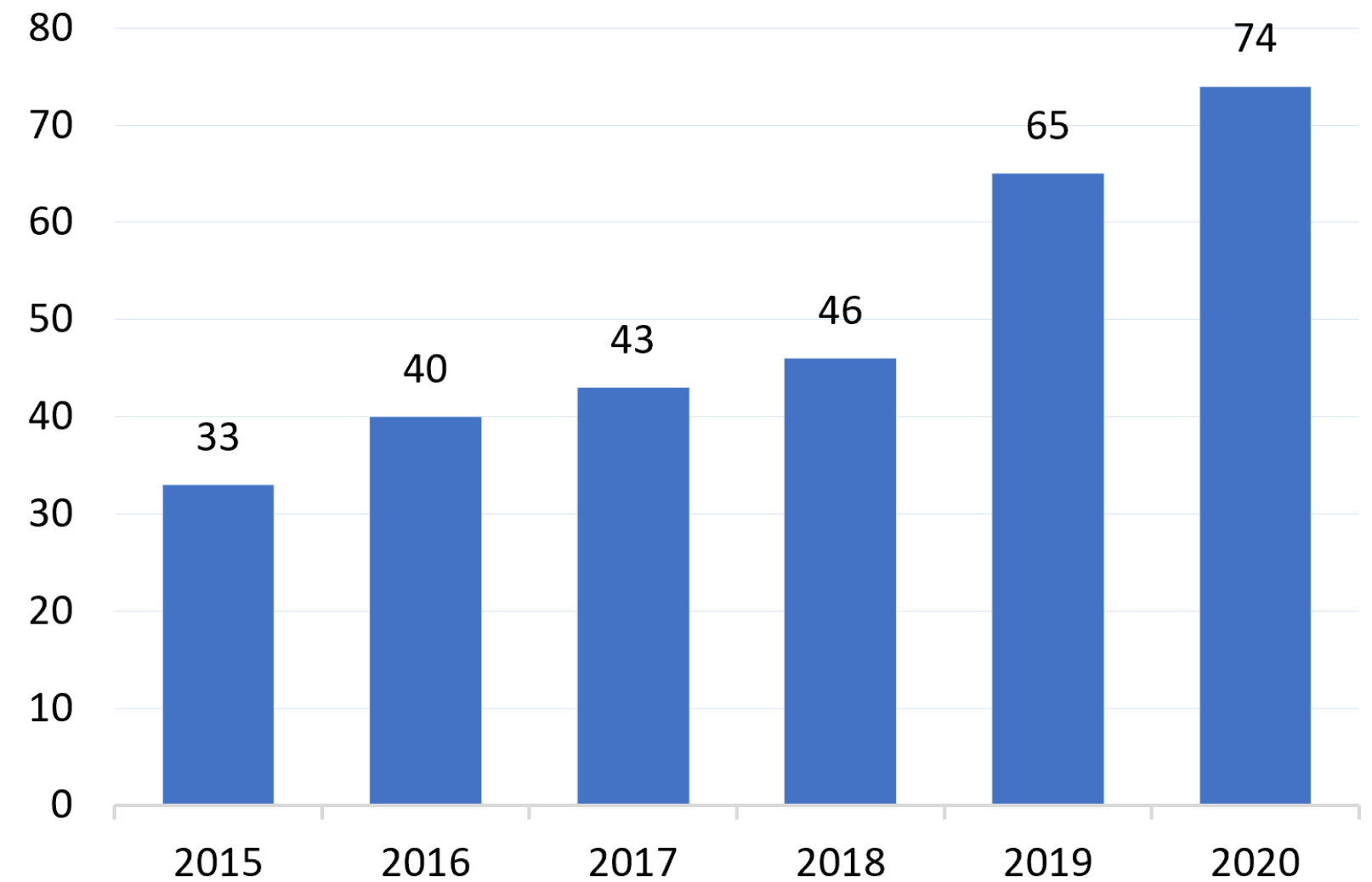
*2 Public Plans Moved To Direct Programs*

*3 Transitioned Assets To Existing MoMs or Have Not Replaced Progress At This Time*

# ESG & Mission Investing Sees Increased Interest

- Interest in ESG Grows As 'S' and 'G' Take On Renewed Interest
- Funds Look At How To Align Mission With Investments
- How To Assess Strategies Continues To Evolve

## ESG/Mission Searches Per Year





**The New Sale:  
Our Changed World Provides  
a Great Opportunity**

# The New Sale: Shoring Up The Ship



Review all marketing AND Sales Materials



Refine Target Markets & Preferences



Revisit New Business Questionnaires



# The New Sale: Maximizing Your Opportunities



Optimize Presentation Materials

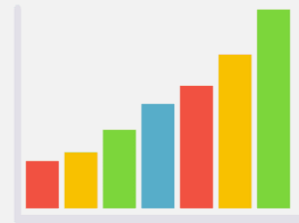


Complete Presentation Training



Affirm Branding and Positioning

# The New Sale: Too Often Overlooked



Comprehensive Track Record Review



Revenue Generation Through Operation Outreach



APRIL

10M

MAY

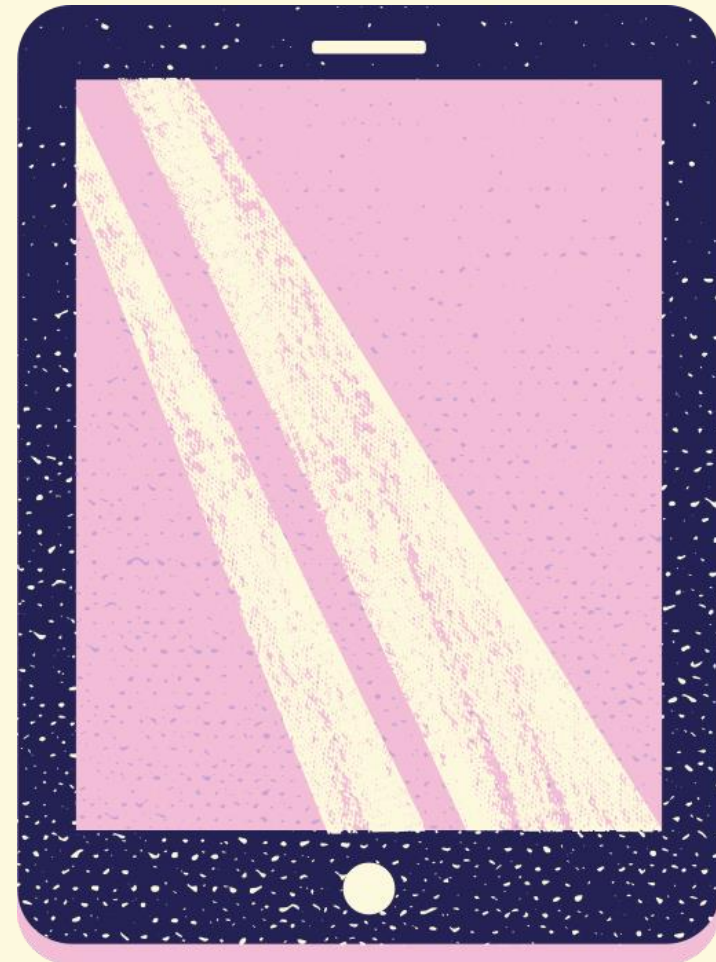
300M

AUG

350M

Daily Sessions on Zoom

## All Systems Go?



### Is my technology ready for prime time?

Don't open your computer at 11:59 for a 12:00 meeting only to find that the update you have been snoozing for the past month is now required or the meeting platform is different from the one you've been using. **Avoid a mad dash by logging on 10 minutes prior to the start of the meeting to ensure your computer is ready to go.**

### How do I look?

Before you hit "join meeting", test out your appearance by searching for "camera" in the bottom left query box and launching your internal webcam. Ensure that (1) your webcam is fully operational and ready to pair, and (2) you are happy with the image & background.

**We often underestimate how much background will be captured and the impact of lighting!**

### Are open windows solely related to this meeting?

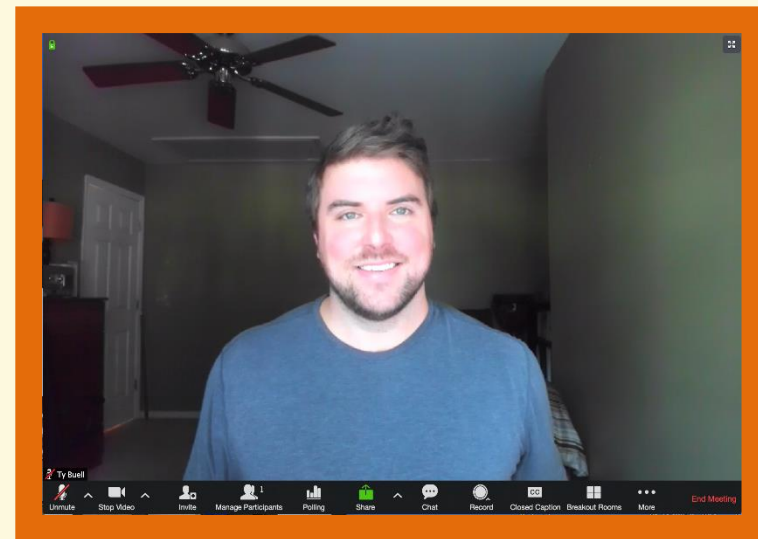
Ensure that the only browser tabs you have open are those related to the meeting. **Close out any PowerPoint presentations, Word documents, your email and any other notes that you are not using to concentrate** on the information at hand and to avoid sharing confidential information.

# Webcam Do's And Don'ts

**Sitting with your back to a window or open door, causing you to get washed out by the intense back-lighting**



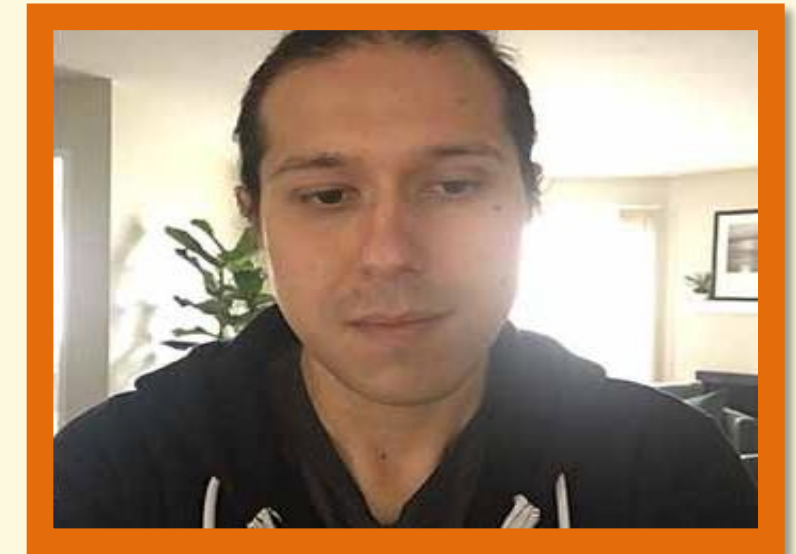
**Sitting facing the window or light source, ensuring there is not harsh lighting behind you**



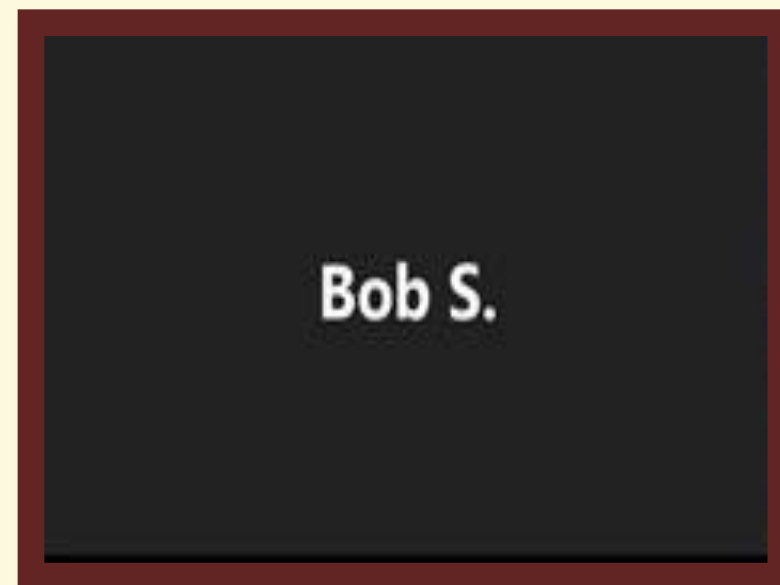
**Putting your computer below you and angling the screen upwards**



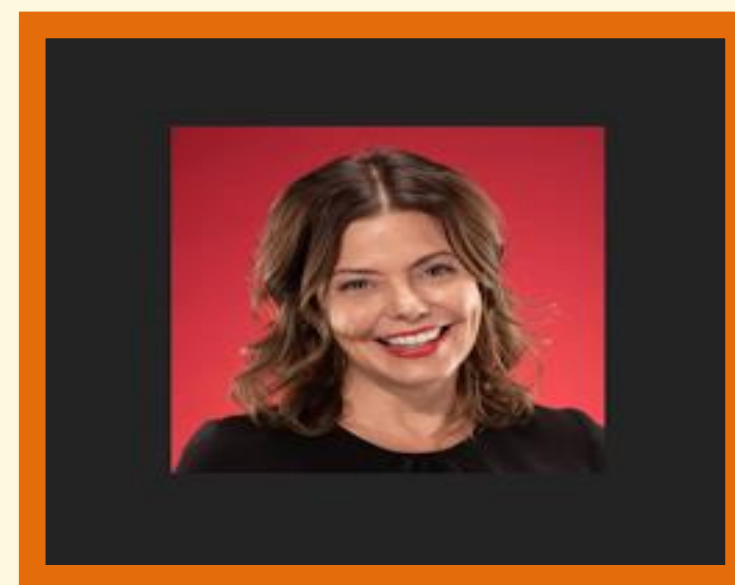
**Placing your computer on a stack of books or laptop lifter so the camera is at eye level**



**Skip the blank profile with only your name, but if you must have it be sure it is actually your name!**



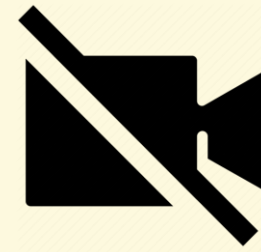
**Fill out your profile fully and import a professional headshot that will appear when your camera is turned off.**



# The Art of Online Presence



- Avoid unpleasant feedback (echoes, high pitched frequencies and other audio noise) by **muting yourself** when not directly speaking.
- Remember that **any noise from your system elevates you to the presenter role** (i.e: your webcam is what shows at the forefront of the screen) Don't take away attention from the core presenter if it is not you– mute!
- **Avoid background noise** that you cannot control during critical business hours and calls, such as your neighbor's barking dog, your children playing in the next room etc.
- Don't forget to **UNMUTE when you want to talk!**



- Explore your video/camera settings; click on the **“enhance my appearance”** button to have the system automatically smooth any blemishes/imperfections.
- Always be aware of whether your camera is on. Consider investing in a **physical camera cover that easily attaches** to the top of your computer and can be slid over your webcam to serve as an extra layer of protection.
- Be aware of **lighting changes that can happen throughout the day**. One good position might work well for early sunlight but deliver a heavy glare in peak afternoon hours.
- Be present! Being on camera demonstrates that you are attending to the meeting, and not the other 20 tasks on your desk. **The best way to connect is through a live interaction, not a substitute photo of you.**



# Online Presence Top Tips

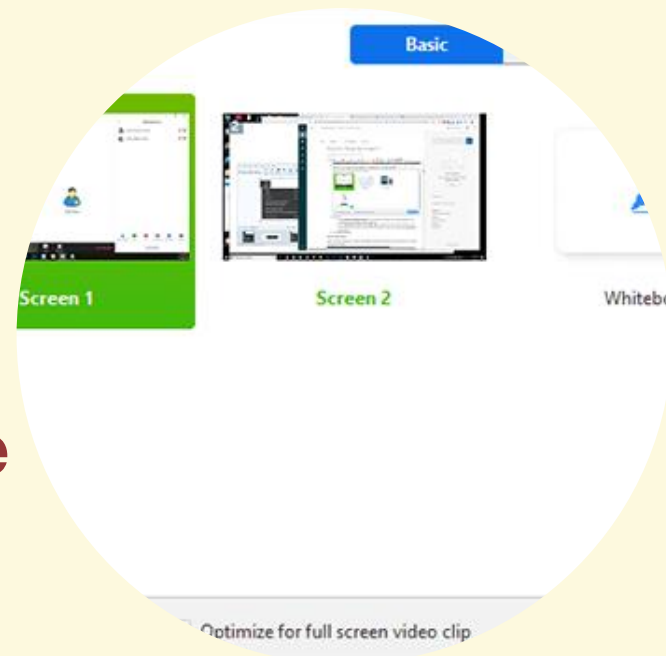
According to a report public by the BBC, “video chats make it much harder to process non-verbal cues like facial expressions, the tone and pitch of the voice, and body language; paying more attention to these consumes a lot of energy. Our minds are together when our bodies feel we're not. That dissonance can lead to physical and mental exhaustion, burnout and overall fatigue. Be aware of this and stick to the allotted time-slot for both your mental health, as well as your colleagues.”

**Affirm Page Numbers**



**Mute Well**

**Mind the Clock**



**Keep Content Confidential**



**Manage Who's On First**

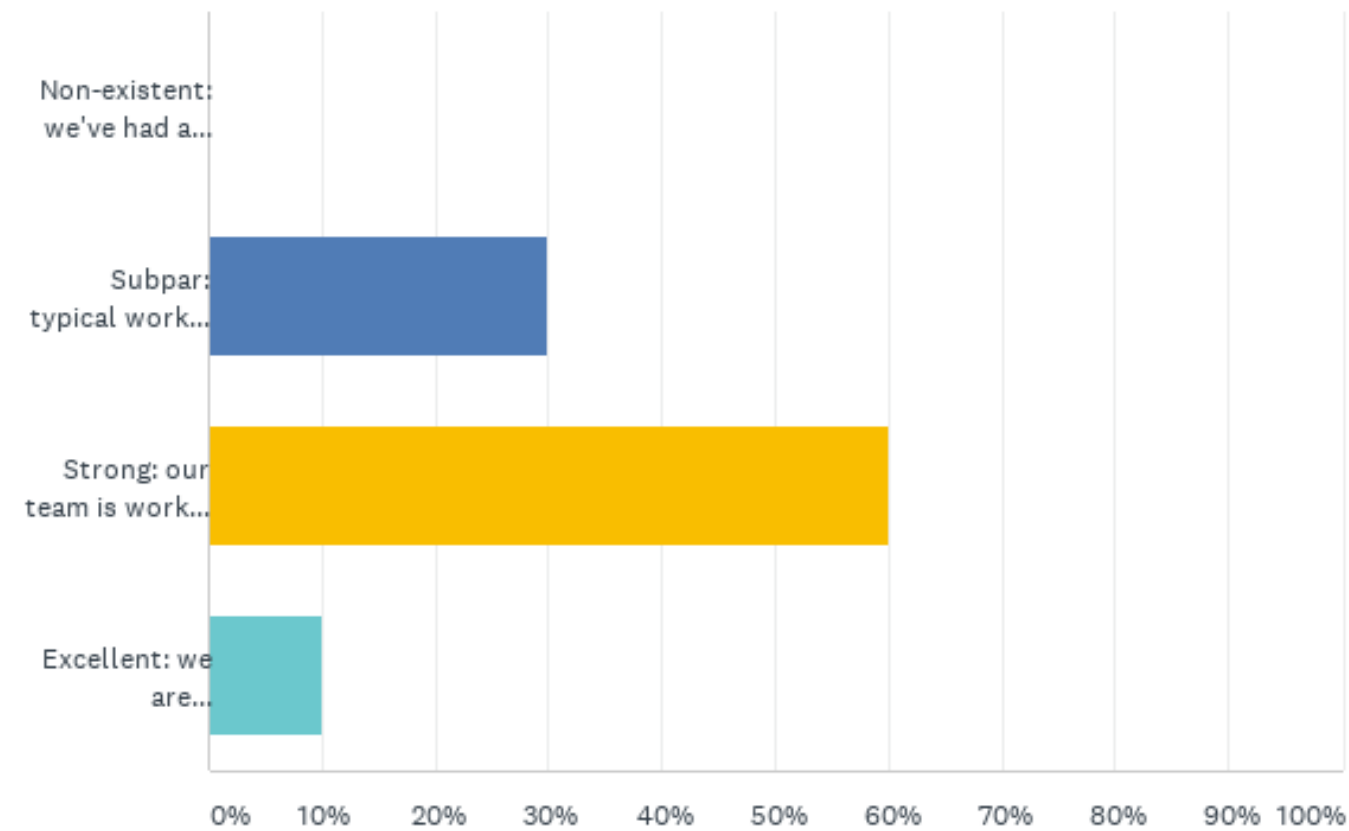


**Be A Pleasant Visual**



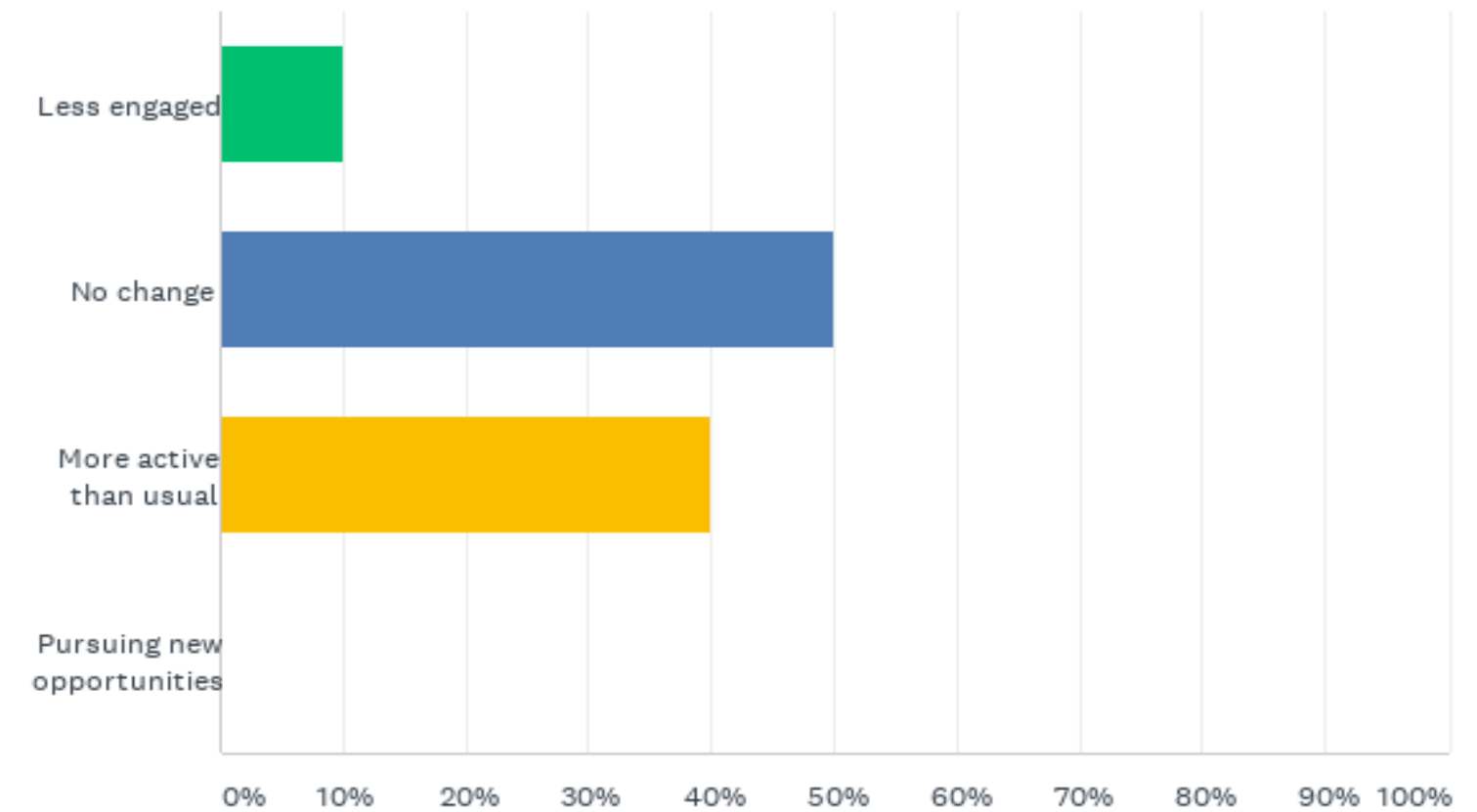
# Survey Results

How has your sales activity been overall in 2020?



Non-existent: we've had a tough time connecting with prospects overall	0.00%
Subpar: typical work effort but not connecting with prospects sufficiently	30.00%
<b>Strong: our team is working hard but not getting flows</b>	<b>60.00%</b>
Excellent: we are meeting/exceeding our asset raising targets	10.00%

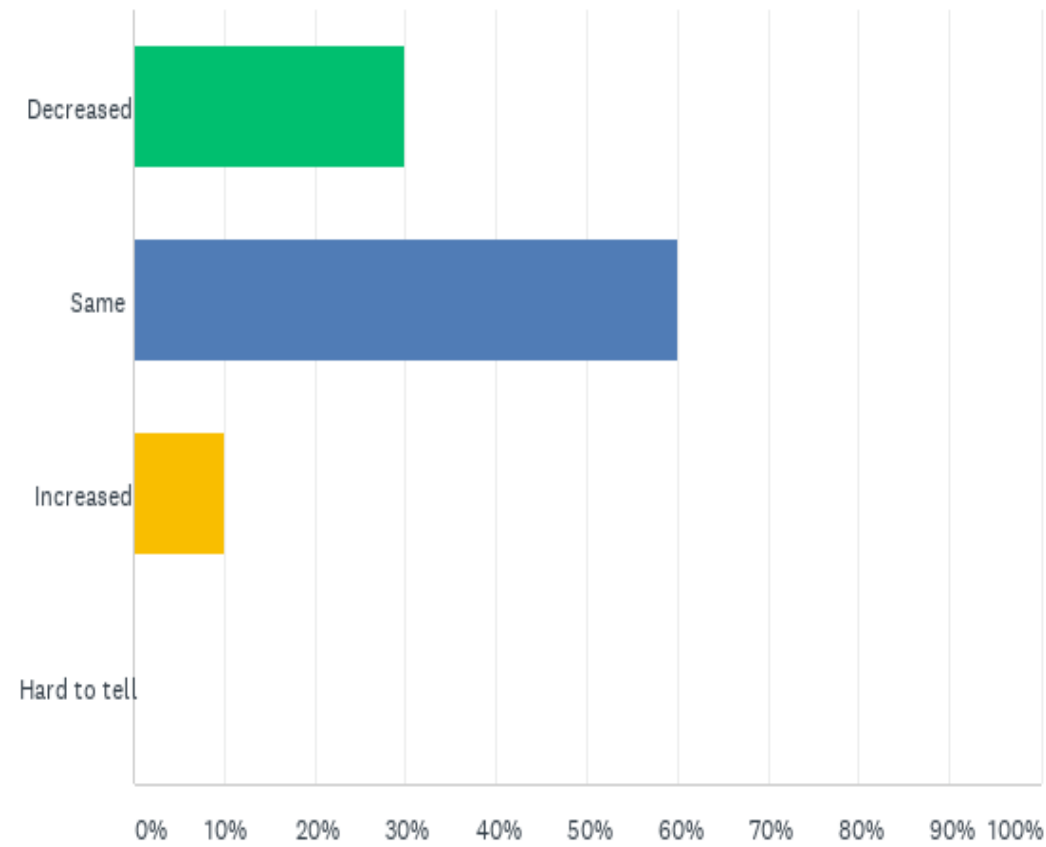
How have managers changed in 2020?



Less engaged	10.00%
<b>No change</b>	<b>50.00%</b>
More active than usual	40.00%
Pursuing new opportunities	0.00%

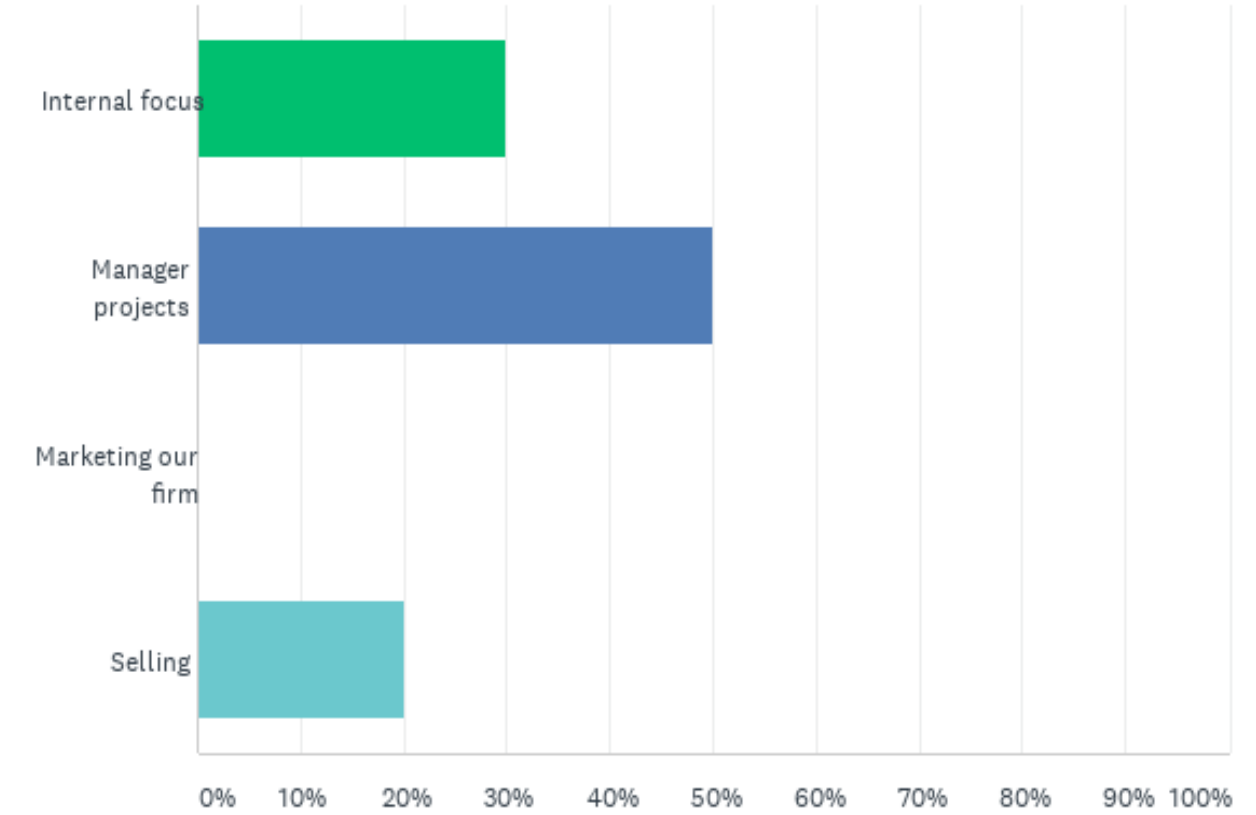
# Survey Results

How has overall productivity been impacted by the events of 2020 and work from home?



Decreased	30.00%
<b>Same</b>	<b>60.00%</b>
Increased	10.00%
Hard to tell	0.00%

With what aspects of your business did you spend the most time in 2020?



Internal focus	30.00%
<b>Manager projects</b>	<b>50.00%</b>
Marketing our firm	0.00%
Selling	20.00%