



Vantage Software

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Differentiating Your Online Brand



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Differentiating your Online Brand and Investor Experience

"The concept of personalisation and CRM has expanded in scope to emphasise a much broader notion of benefits to a company."

Tyrone Jackson

Personalisation and CRM

Journal of Database Marketing & Customer Strategy Management

October 2007

Differentiating your firm through Branding and Messaging

A client's online experience consists of a combination of Internet searches, visiting your company website, reviewing your LinkedIn profile, logging in to their client portal and social media sites and feeds. With so many opportunities for investors to perform due diligence about a firm, is your firm prepared with a consistent message across every form of digital and social media for your brand?

Branding and messaging was the topic of a panel discussion at the PEI IR Conference held June 12, 2014, at the Convene Center in New York. Panelists included Franny Jones, Director of Marketing and Investor Relations from the Sterling Group in Houston, Texas; Andreas Moon, Principal and Head of Investor Relations & Fundraising at iSquared Capital, New York; Erika Spitzer, Head of Investor Relations at Leonard Green & Partners, L.P. in Los Angeles, California and Greg Woolf, CEO of Vantage Software based in Boston, Massachusetts. Roland Tomforde, CEO, of Broadgate Consultants, led the panel discussion.

While private equity firms are very reluctant to be in the social media space, most firms realize the necessity of keeping their brand in front of investors to maintain an edge over other firms. Being recognized as a subject matter expert in their area of expertise is one way to gain that edge.

Is your Firm a Convert or an Influencer?

Today, you need to take control of your firm's online reputation. Some attendees said they use social media to monitor what is being said about their firm and go on the defensive when negative press is published. A few firms are embracing social media to build their brand and emerge as a thought leader.

Most often, the first place most investors will look when performing due diligence about a firm, their partners, portfolios and funds is a website. Firms need to build a foundation of their online digital presence and be an influencer. Firms want to be the first resource for investors and future investors, whether they are investing in one of their funds or somewhere else. It is important to be that resource which reinforces your brand. Updating the firm website is the first step.

Website Design Styles

A website is paramount for any firm. With a crowded market, it is critical to make certain your website is user-friendly and compatible with mobile devices while providing a consistent message and thought leadership that will differentiate your firm from all others.

"I spoke with IR Managers who attended the conference and they said it took them up to a year to redesign their website" said Woolf. "It took us six months to redesign ours." Woolf and his team worked with website designers, marketing personnel and content writers to create what he calls "the pre-school approach" – an easy-to-use style that enables website users to quickly navigate through reams of content found on the internet today.

The days of multiple tabs, links and an overload of content are over. Today, websites are very straightforward and simple with long pages to scroll through for information. A website needs to get a message across very quickly.



To make the online experience pleasing for the visitor, the site needs wide spanning images, interesting imagery, large fonts and contrasting colors that make your site very visible and dynamic.

Take Control of Your Online Reputation

Investors want to succeed in business and usually select one area to focus on so their investments perform well. The same applies to your online reputation and social media. While a website is a must-have, don't try to emulate major corporations and use every form of social media at once.

Find the right social media outlet for your firm. Facebook, twitter, LinkedIn or a blog - select one and master it. Does your firm have someone to maintain your various media outlets or is this an add-on to someone's already taxing schedule? The huge amounts of data involved raise the stakes for choosing the right technology and the right person. You may not need sophisticated software tools to measure Web and mobile traffic, track performance on social networks, and create data visualizations and reports right away, but you will want to have a baseline measurement to start.

Social Media is Scary: To Embrace or Not to Embrace?

Many investors are looking at information online with iPads, smart phones and other devices. LinkedIn is a medium to connects with current and prospective investors by providing links to interesting articles, webcasts, research papers and updates. Some larger firms are using twitter to disseminate information such as announcements, research papers or personnel promotions and changes.

The field of social media is rapidly evolving. Having a brand website is no longer enough. The level of information that people ask for has drastically changed over the years. Years ago, detailed operational and reputational diligence was far and few between, now your LPs do a deep dive into GP profiles and operations to ensure the level of transparency meets the needs of investors.

The panelists noted that the Private Equity space is reluctant to jump into the social media space with the SEC's scrutiny of the industry. IR Managers are stuck in the





middle; between a conservative partnership and investors who want as much information as possible through any digital arena.

“We are seeing an increase in white papers and blogs where firms are providing thought leadership as well as information that will help investors make decisions based on the information provided by partners and leaders in their firm” said Woolf.

Creating an “Online Banking Type Experience”

Creating an online experience that will make it easy for people to find what they need is not an easy task. “The financial services industry has moved to an online self-service model,” said Woolf. Those who attended the panel discussion were asked to participate in an informal poll conducted when he asked “how many of you use online banking?”

Almost everyone raised their hand. When online banking was introduced, retail customers embraced the ability to bank on their own schedule. They like the convenience, they like the control, they like the ability to make changes on their schedule and of course, to know how much money they have. Even more so for private equity investors who have much a larger investments at stake than retail bankers.

Investors want the same type experience. They crave personalization as well as the ability to see their investments on demand through sophisticated and personalized portals where they can “slice and dice” their investments and make intelligent decisions.

Online banking studies conducted by Gartner, Inc. in 2007 revealed customers want communication, transparency and personalization. According to the study, “customers want to personalize their experiences, analyze their transactions, and payment data so they can better manage their money, pay bills, and transfer funds.”

No matter how you present your figures for each quartile, investors need to have hard numbers to support the firm’s claims, and investors want the ability to see the figures through portals with sophisticated dashboards and reports.



Woolf added that his client's want transparency with the ability to measure fund performance providing investors with the flexibility to make decisions on their schedule, 24/7. Investors want to see pie charts, roll outs of transactions, reconcile cash flows, and dashboards with an interactive, on-line banking type of experience.

Your online experience should be personalized and all about the client, the prospect, the investor, and the end-user. This is especially true of small, growing firms who want to convey a world-class professional impression to their investors.

Know your Audience

Websites, social media, maintaining, updating and consistent messaging takes time and money. But how can a firm know they are spending their money on the right tools to meet the needs of their clients?

Google Analytics is an excellent way to find out who is looking at your site and how long they are staying. Having tools in place to track online communications, website and mobile traffic, social media and other data will allow your firm to track visitors and base decisions on future campaigns and the type of social media you use with hard evidence. Just as clients want to know as much about the firm they are investing with, the firm needs to know who is investing in them.

Conclusion

We cannot stop investors from searching and talking but we can populate the World Wide Web and social media sites with tantalizing information that showcases the strength, depth and passion of your firm and its principals. It is up to each individual firm to provide timely and appropriate information with a consistent message delivered by everyone associated with your firm to its stakeholders via email, websites, LinkedIn, Twitter and the occasional article in a print newspaper or magazine. And while you are providing thought leadership to your constituents, don't forget to take the time to monitor and listen to the needs, wants and desires of the investor so your firm will be the first resource they turn to for advice and investing.