



# Share Your Message

Communicating a  
Compelling Value Proposition

# Who Are You?

Too many firms try to be all things to all people. Focus on what it is your company does well and where it will provide value. Once you identify your key message, you can build your communications plan around it.

## Breaking Through the Clutter.

Whether you're talking to investors, financial professionals or reporters, your key message needs to break through the clutter and differentiate you. With over 12,000 mutual funds and thousands of managers, your target investors and intermediaries want to know quickly and succinctly how your firm will provide them tangible results.

In an industry where regulations won't allow you to flaunt specific financial statistics without extensive disclosures, articulating the unique benefit you bring to the table can be particularly challenging. Your value proposition will most likely revolve around a combination of philosophy, process or service. The good news is that any of these can permeate all of your products and be a driving force for how your entire firm approaches their responsibilities.

## Build Your Organization Around Your Value Proposition.

Too many companies try to be all things to all people. This just leads to confusion in the market and chaos internally—not to mention spending valuable resources on less profitable products. Multiple product lines and distribution channels are a good way to diversify, but not an effective way to build your image in a crowded marketplace.

A strong value proposition crosses over all of your products and is grounded in delivering something your investors need. Choosing one discipline does not necessarily mean you abandon others. What it does is dictate a set of behaviors and beliefs that employees can rally around. By narrowing your focus, you open the door to expanded energy and emphasis. In fact, it becomes the guiding reason for everything you do. If investors can readily see and value what you bring to the table, they will invest their money with you to get what you promise.

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As an example, the parent of a well-known fund company states, “Our companies make a difference in people’s lives by helping individuals, families and institutions put their hard-earned money to work.” Another firm’s story revolves around “providing investors with innovative strategies that dynamically blend investments to manage risk and enhance return potential.”

### **Communication. Communication. Communication.**

Regardless of how eloquently you craft your value proposition, ensuring that it is internalized by everyone working in your firm is imperative. A focused workforce can go a long way in establishing a visible difference between you and your competitors, increase the quantity and quality of prospects for future investments and increase market share in those segments you’ve targeted.

**Your value proposition is the lynch pin in your marketing plan, while communicating this story to your existing investors reinforces the decision they’ve already made.**

It’s important to remind current investors that they are getting what they signed up for by showing how your actions and performance delivered the value they expected. Building your public relations and marketing messages around your value proposition provides a sense of purpose and continuity to all your actions.

Even expressing the decisions portfolio managers made should support the firm’s value proposition. When talking with the press or advisors, spokespeople need to weave a story that rings true to the investor’s expectations. Continuity across all facets of your communications will solidify your identity and help build top-of-mind awareness for your products.

Everyone, from reception through salespeople up to the CIO, needs to be telling the same story. Reporters are looking for credibility. So, for instance, if a firm’s value proposition revolves around growing secure retirement assets, that’s the authority they want to quote. Reporters are anxious to talk to the experts and having a well-established identity puts you in the forefront.

### **Your Message is Worth Hearing.**

At SunStar, our extensive experience with the financial community provides us with a unique understanding of the industry and the people who cover it. We know how to get your story noticed. Once your value proposition is solidified, our media boot camp program puts everyone on the same page. This specialized training teaches portfolio managers how to control the interview process so that your story can be woven into every answer. Many firms have benefited by providing this same training to their wholesalers and customer service staff, ensuring that your key message is delivered to the public firm-wide - because, in the end, a story is only as good as the people telling it.

**The more  
specific  
your value  
proposition  
is, the better.**



SunStar works with retail and institutional investment managers and mutual fund firms to attract investors, strengthen distribution and build brands through structured news generation programs and smart marketing. We know the industry and the reporters who cover it. We also understand the often challenging legal, regulatory and compliance issues facing clients.

**Find more about smart marketing and successful public relations campaigns in our blog.**