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# Excess Returns

Insights for Investment Marketing and Sales Professionals

## Quantity Over Quality? | December 2024

Investment marketing can be a fun and fulfilling career offering the opportunity to learn about diverse investment strategies in vastly different world markets. But investment marketers also confront challenges such as resource limitations, deadline pressures and compliance constraints. Perhaps their biggest challenge, however, is operating in an environment that often prioritizes quantity over quality. This issue of *Excess Returns* considers how marketers can achieve quality in a world long ruled mainly by quantity.

With best wishes,



Liz Hecht  
Founder

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*Alpha Partners is an investment marketing firm offering custom research, marketing communications and presentation coaching. Our goal is to create alpha (excess returns) by helping investment firms win, keep and diversify assets under management.*



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### More and Better

**Fund Manager:** We need more meetings.

**Marketing Professional:** Are you getting good responses from your presentations?

**Fund Manager:** We haven't had any hits so we need more meetings.

**Marketing Professional:** Let's use the feedback you've received to work on the presentation.

**Fund Manager:** First, we need lots more meetings.<sup>1</sup>

The asset management business often is mainly about more. More meetings, more assets, more money. And that's all fine. Yay for more. But what about better? Certainly there also is room for better. Of course there is, and here are a few ways to better your company's marketing in 2025:

**Create less-is-more presentations.** Do your new business presentations waste precious time overexplaining the obvious? Or do they cut to the chase of competitive positioning and audience interaction—why you invest the way you do with plenty of time for questions? Do your meetings include laborious detail about an investment process destined to sound pretty much the same as those of competitors? Or do you zero in on the need that led to the search, ideally with focus on how other clients with similar needs use the strategy?



*More by itself usually translates into more of the same. To stand out relative to competitors, asset managers need quality as a foundation for quantity.*

**Build a culture of respect for marketing.** Everything starts with culture. Are your marketing professionals the right people with the right compensation? Do you treat them like lackeys or do they feel included in the process of new business development and client retention? Do they have the resources they need to do a great job consistently, operating in the context of a process clearly linked to well-defined business objectives? Or do they operate in an environment where their days are subject to the whims of portfolio managers and salespeople who are paid top dollar by industry standards while they as marketing pros are paid middle of the range?

**Give your salespeople better ways to sell.** Do your salespeople have access to fresh intellectual capital providing high-quality reasons for following up? Does your team produce articles, white papers and webinars that help consultants, plan sponsors and investment advisors do a better job? Or are your salespeople often compelled to send emails and make follow-up calls that start something like this: “Hello, just touching base again to see if you are still interested in XYZ strategy.”

In sum, “Quantity or quality?” is the wrong question. Why? Because more *and* better is possible and because better usually begets more. Better marketing materials beget more compelling, client-focused meetings, stronger competitive differentiation, more respect from consultants, more new business wins, more cross-selling and more happy clients. All of which in turn begets more of the right people with the right compensation to generate better investment performance and create better marketing materials. It’s a classic virtuous circle.

## A Balancing Act

In pursuing their everyday responsibilities, many marketing professionals experience constant tension between quality and quantity. Of course the pursuit of more and better requires resources that some firms might not have at a given point in time. So getting it right becomes a balancing act. But quantity doesn’t have to compromise quality. It doesn’t have to be about 6 high-quality newsletters in 2025 versus 12 mediocre newsletters. Quantity paradoxically often generates better, more efficient, higher-quality ways of doing things—one successful form of content used in different ways, for example, or one succinct presentation with certain key, compliance-approved pages customized to different target markets.

## Measuring Quality

We live in an age when customer service professionals, after the simplest interaction (you asked a question, they answered it), request that you complete an online survey rating their performance. Given this surfeit of surveys, how can your company effectively measure qualitative interactions with consultants and clients? Of course there are all kinds of useful quantitative measures such as marketing return on investment (ROI) and client acquisition cost (CAC). But these do not address *why* your overall marketing or a given marketing initiative is or is not successful.

The tried and true approach is a process for capturing and acting on market feedback systematically. Just as investment teams meet regularly to consider upgrades and improvements to the portfolio, top-notch marketing teams meet regularly with key stakeholders to upgrade and improve their firm’s marketing materials. Marketing alpha, just like investment alpha, is a process based on discipline and consistency.

1. A snippet of conversation found on a LinkedIn post and shared secondhand with me by a friend and former client.

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