

# Case Study: Boutique Small and Mid Value Asset Manager Seeks Advisor Brand Awareness and Engagement

## The Challenge

Small employee-owned asset manager has strong positioning for brand, products & value proposition but like many boutique managers, has had limited marketing resources and development dollars.

### The Current State

#### Goal:

Increase brand awareness and mindshare of advisors broadly.

Employees: 40

AUM: \$2.5 billion

Budget: \$350,000

Presence: United States

#### Investment Capabilities:

- Value
- Small and Mid-Caps
- Long/Short

#### Channels:

Primarily Institutional

### Our Solution



Advisor and home office engagement via shared sales, national accounts, and marketing personnel



Lead gen and exposure created via regularly promoted emails and social media posts



Brand, people, and product storytelling via award-winning video content: brand video, manager spotlights, and remote quarterly product commentaries



Access to leading broker dealer platforms through strategic partnerships

### The FLX Advantage



#### Cost Savings

- 85% savings vs. maintaining same personnel and licenses in house
- \$225,000+ annual savings in partnership program access to leading B/D and TAMP platforms
- 80% cost savings vs. other video providers



#### Growth Potential

- 6,500 individual sales touchpoints over 12 months
- Quarterly flows have increased 250%
- Platform placement at three leading broker dealer platforms
- 250,000+ emails sent to validated and targeted advisors and home office contacts in 2023 alone



#### Productivity

- Time otherwise spent on sales efforts and marketing is now dedicated on internal focuses and expertise
- Extend the utility of written commentaries by converting to videos