



SunStar

FUNDFACTOR

Story Development

Media Training

Positive News Coverage

Reprint Distribution

Take That Reporter's Call During Volatile Times.

Many journalists tell us that during volatile times, similar to the tech decline in the early 2000s, they have to make many more phone calls than usual to find fund managers who are willing to comment for a story. Why? Because there is much bad news. This is a mistake. At SunStar, we believe you should take this opportunity to tell your investors that you are in control of your portfolio and are sticking to your disciplined investment process because you believe it will return into favor.



Dan Sondhelm

Know This.

Reporters are not out to get you. They, like all of us, are doing a job. They need copy to fill their magazines, newspapers and Web sites in good times and bad.

Tough markets take a toll on most funds. Some of the investment decisions you make are right on target, but some don't work out. Some fund managers may bury their heads and take criticism from reporters personally.

But, if you have the tools and experience, these tough times can create additional opportunities to elevate your fund's visibility in a crowded market.

Think Opportunity.

It is possible to develop the media savvy you need to be in control during an interview. When you are prepared, you can answer the journalist's questions AND weave in the messages you want to communicate. For instance, if your fund is overweight in financials and that sector has taken a downturn, rather than sounding apologetic your answer can be fashioned to include messages about your forecast for that sector or your disciplined investment process and its long-term outlook. By bridging to something positive about your asset class or unique philosophy, you are gaining valuable third-party press coverage that, in good economic times, may be more difficult to garner.

You'll also be providing an important twist that your wholesalers and financial consultants will likely incorporate into their pitch, quoting you as an expert. They will appreciate that the fund is visible and credible in any market. More importantly, being quoted in the media is the least expensive, yet most authentic and valuable way to reach investors directly.

Tips for Staying on Message.

- Focus on your value proposition.
- Know your target market and their greatest concerns so you can fashion answers that address those issues.
- Where possible, explain your philosophy and process.
- Don't shy from repetition: you know your story, but most readers/listeners don't.
- Stress the long-term benefits of your asset class and investment discipline.
- When asked a negative question, answer in a positive light.
- Use techniques such as headlining, blocking and bridging to couch your answer within broader themes.
- Practice using phrases such as: "The most important thing to consider..." "What is important to remember..." "That speaks to the larger point of..."

Fear or Reality?

We understand that during difficult times, portfolio managers want to focus on managing the portfolio, feeling there is no time for interviews. Perhaps, but be sure to think it through and evaluate how much of your reluctance is due to fear of the interview over the reality.

At SunStar, we work with portfolio managers every day, coaching them and helping build the confidence required to speak with journalists and other audiences - and stay in control of the message. Our Media Bootcamp includes practice interviews in a TV studio setting. Then, together, we review the tapes, critiquing everything from remembering to use the fund's name repeatedly to giving positive answers to negative questions, while still being responsive to the interviewer.

Call us at 703-894-1046 to discuss how SunStar can help you achieve recognition in this competitive environment.



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:
FundFactor.net**