



# SunStar FUNDFACTOR

Story Development   Media Training   Positive News Coverage   Reprint Distribution

## Smile! You're on Candid Camera.

Are you old enough to remember Allen Funt's Candid Camera? How about America's Funniest Home Videos? In either case, it's obvious that being caught "just being yourself" is not necessarily putting your best foot forward for the camera.

While being relaxed and natural with reporters and TV personalities is good, what's best is being prepared and in control. SunStar's media tips that follow are but a small sampling of the skills we teach in Media Bootcamp for portfolio managers and other spokespeople in your firm.



Dan Sondhelm

### What's YOUR Story?

When you're called to do an interview, you'll expect the reporter to ask the questions. You may even get them in advance. But that's their story - not yours. Of course, you'll want to intelligently and concisely answer those questions, but having your story clearly structured in your own mind first allows you to cast your answers in a way that puts your firm in the best possible light. Make certain your prep time includes thinking about:

- Why your asset class?
- Why your fund and process?
- Why your fund now?
- Recent decisions that had positive outcomes.
- Important themes in your portfolio.
- Top stocks and why you own them.
- Overweight sectors.

### I Wish They Would Have Asked About...

When you enter an interview with the key messages you want the public to hear at the top of your mind, your chances of delivering those messages go up a hundred-fold. Prepare those messages in advance rather than trying to predict what the reporter will ask.

### Who's on First?

"What's on second. I don't know's on third." Interviews where seemingly random questions are asked and answered are just as likely to have listeners scratching their heads as when they hear that age-old joke. Yes, you've been responsive, but the real job you've got on camera or in an article is to convince the investing public and their financial advisors to pay attention to your fund now.

**You can be in control of the interview if you keep these points in mind:**

- Advisors and consultants prefer investment processes that provide predictable and repeatable results. So, try to talk about your investment process whenever possible. Focus your comments on what they mean for your portfolio.
- Stay on message. If the question is not essential to your portfolio or process, address it briefly, then bridge to messages that are of interest to your shareholders.
- Explain your process in a straightforward, step-by-step way. (If the reporter doesn't understand he/she will not necessarily ask for clarification; it will be wrong or not written about.)
- Answer the question asked, as opposed to the introduction to the question.
- Choose one question to answer if asked a multiple part question.
- If you "avoid" answering a question, do answer it if the reporter asks the same question twice.
- Never repeat a negative question.
- Keep your answers appropriate in length—not too long or short—to prevent being misquoted. Don't over-answer.
- Avoid industry jargon because many investors won't understand it. Instead keep it simple.

**Before Every Interview...**

Review these concepts before every interview. Whether you are an experienced interviewee or just beginning to catch the media's eye, doing that will ensure that media attention serves as a significant marketing opportunity. Be it TV, radio, magazine or Internet coverage, the media's reach and credibility will go a long way towards driving attention to your products. A positive, well-crafted story should always be your goal.

At SunStar, our extensive experience with the financial community provides us with a unique understanding of the industry and the journalists who cover it. Our Media Bootcamp teaches portfolio managers how to control the interview process so you get the maximum benefit from your time.

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:  
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