

SunStar Media Briefing Case Study

Media events provide an opportunity to bring journalists together with members of your team with the shared goal of forming or deepening relationships. Nothing compares to in-person, one-on-one handshakes and conversations.

Our May 25, 2016 Media Briefing for Top Performing Mutual Funds featured seven fund executives addressing a room of two dozen key financial reporters. In this case study, we explain the benefits, the process, and the results of the event.

The Benefits

The event was held in a private room at a New York City hotel – an intimate setting that nurtures relationships and creates connections between the managers and journalists that could last for years to come. At the Briefing, the fund managers explained their strategy to reporters in a professional group setting of their peers. They also addressed specific questions during the Q&A, as well as the opportunity to speak one-on-one following the prepared remarks. A handful of stories appeared immediately and future press coverage is expected to result.

The Process

Our process was elaborate and simple all at once. We kept the day brief enough to fit into a reporter's busy schedule.

In the one to two months preceding the media event, SunStar Strategic team members created a pitch to send to reporters, letting them know what to expect from the event, who would be present and what value they would get from the day. We targeted reporters who cover the topics presented to increase the likelihood of getting media coverage on the day of, or after the event.

SunStar Strategic account executives reached out to each fund manager to guide them in structuring their presentations, discussing the ideal length for their presentations and offering insights into what this particular audience would find of greatest interest. The presentations included the fund's strategy, the manager's market outlook and details on themes in their portfolios or favorite investments.

We also offered coaching calls to listen to the presentations beforehand and help the fund managers focus their messages. Our executives ensured that all the managers' questions about the logistics of the day were answered.

The Event

The day's agenda allotted about 10 minutes to each of seven fund presentations, as well as time for the Q&A period. The fund managers arrived an hour before the event to get comfortable with the room set up and answer any questions they have with the SunStar Strategic event team, who arrived two hours before the event to help oversee audio, video, signage and coordinate with the on-site staff.

The Audience

We invited a number of qualified media members, hosting about 25 on the day of the event. Early arrivers had the opportunity to speak with presenters in advance during a casual, continental breakfast. Media coverage was not guaranteed, but the fund representatives and SunStar account executives ensured the journalists got written and spoken information and the opportunity to get all their questions answered. SunStar executives followed up with each attendee following the event as well.

Value of the Event

The value of the event to both clients and reporters is in the connections created that day. For a reporter, it may be the content that helps them write a story or an idea that they heard that helps them create a future story, or a source that is established on the day of the event. For a client, the value lies in the relationship created with the reporter or reporters in attendance and the chance to deepen relationships with SunStar Strategic's staff and management.

Feedback from the Event

"The structure of the event was well thought out," said Brian D. Milligan, Portfolio Manager of Schwartz Investment Counsel. "The seven minute format was efficient."

"I found the panel very interesting and informative. I really enjoyed it," said freelance journalist Lisa Kaplan. "It was valuable to hear the different portfolio managers' investment strategy, and what they are thinking for future strategies. I also found it helpful to hear the similarities and differences in terms of their strategies."

SunStar Strategic has hosted numerous successful media events that have fostered enduring relationships between our clients and the media. Get in touch with us to discover how our highly skilled team can create a custom event to promote your products and spokespeople.