

# THE IQ/CLIENT PROCESS

## HOW WE WORK WITH OUR CLIENTS



### Getting Started

- **Defining the Project** We typically work on a project basis, which means that we agree to develop a specific set of deliverables (e.g., logo, stationery, pitch book, website, white paper, and so on) for a specific price within a set time period.



### Fact-finding / Research

- **Probing in Depth** We learn as much about your business as practical—with a focus on how you make money for your investors. We also study your prospecting process. We tend to learn more than we'll ever use in your marketing materials. But the extra depth gives us the means to simplify, clarify and prioritize all the important points.
- **Pursuing Multiple Paths** To accomplish our fact-finding, we meet with you (in person or by teleconference), review your legal documents and any existing marketing materials, and perform independent research as needed.



### Brainstorming / Positioning

- **Bringing Objectivity** We consult by questioning, discussing and debating. We use our outside objectivity to identify: competitive advantages; what will be most intriguing to prospects about your firm and offerings (as opposed to what's most intriguing to you); and what will ultimately differentiate you best in the marketplace.
- **Reaching the Goal** Our objective is to help brand and position your firm and offerings in a way that will create a compelling marketing story, one that is easy to understand but hard to forget.



### Creation

- **Developing the Content** Once we've completed our fact-finding and brainstorming, we begin developing the content—headlines, text, visual/diagrammatic treatments, charts, and so on—for whatever materials or presentations we've been engaged to produce. We create the content based on our discussions during the fact-finding/research and brainstorming, as well as the knowledge-base we've amassed during our long experience in the alternatives space.



- **Telling a Unique Story** Our mission is to create a story that is unique to your investment offering. This involves a number of key elements:
  - Stripping things down to the essentials to make the story simple and clear—but still complete and compelling.
  - Finding the right facts and demonstrating them clearly—rather than just reciting platitudes about how good you are—and letting prospects come to their own conclusions.
  - Showing how you make money for your investors and why your method is effective and consistently replicable.
  - Always communicating from your audience’s perspective; it’s just as much about them as it is about you.
- **Designing the Look** When we feel that we are getting reasonably close to consensus on the content, we begin developing graphic-design approaches for you to choose from. Once you’ve made your selection, we start merging your chosen design direction with the content we’ve created (and/or start building your website).
- **You React** During this creation process, you are put in a reactive mode, which frees you up to provide valuable feedback, ask questions and suggest revisions on the drafts we present.

## In the End Zone

- **Completion** When we arrive at the point where you and we are both satisfied with a particular deliverable, we can be fairly certain that it is “good to go.”
- **Delivery** We then deliver the piece (i.e., the master file for a pitch book or a launch-ready website) so you can begin using your new marketing tools to help build your business.

If you have any questions, we encourage you to contact us:

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