



## 4 Benefits of Using AI in Fund Marketing



**Paul Das**

**CEO**

ProFundCom

ProFundCom

# ProFundCom

Using Marketing Automation to Raise AuM

To AI or Not AI

For the last 20 years we have helped fund managers **raise assets** using **marketing automation**

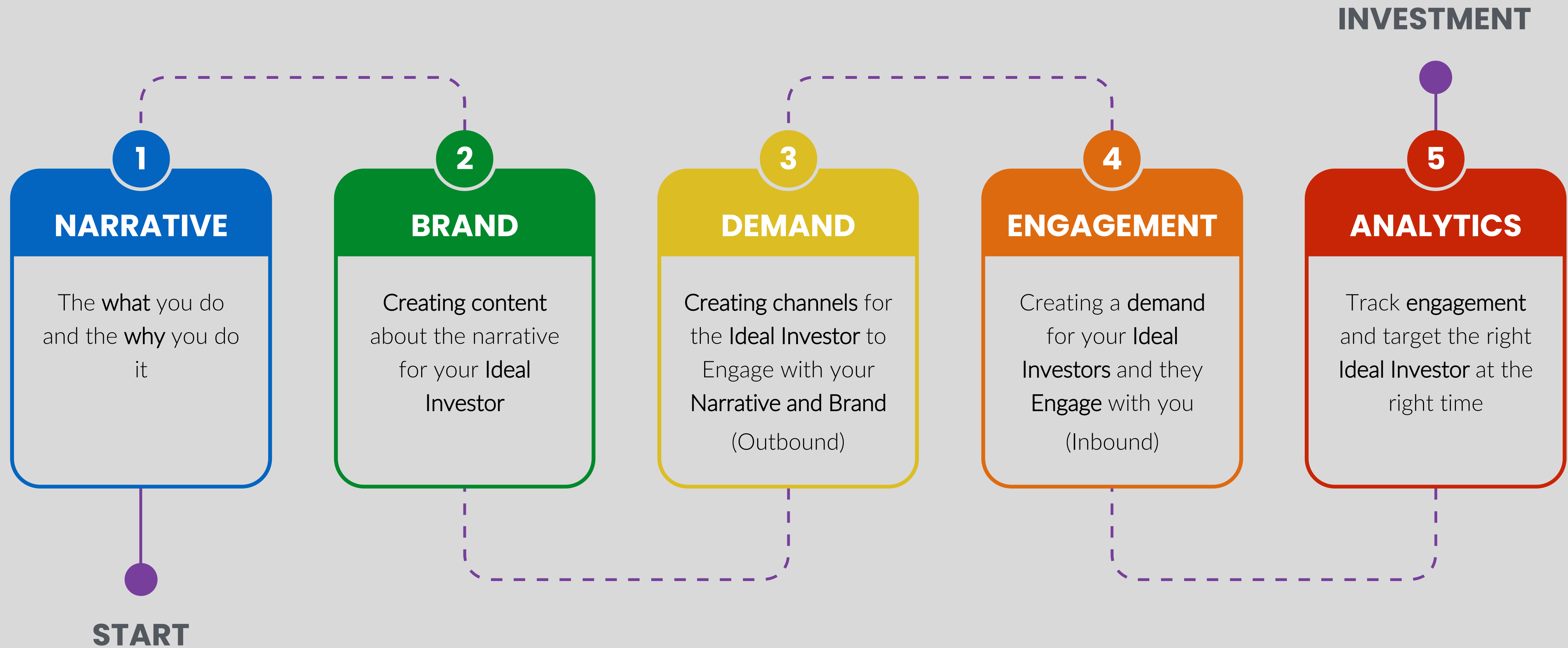
Trusted by global financial institutions



# GTM – Go To Market

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The REAL Plan – IF YOU ONLY DO ONE THING

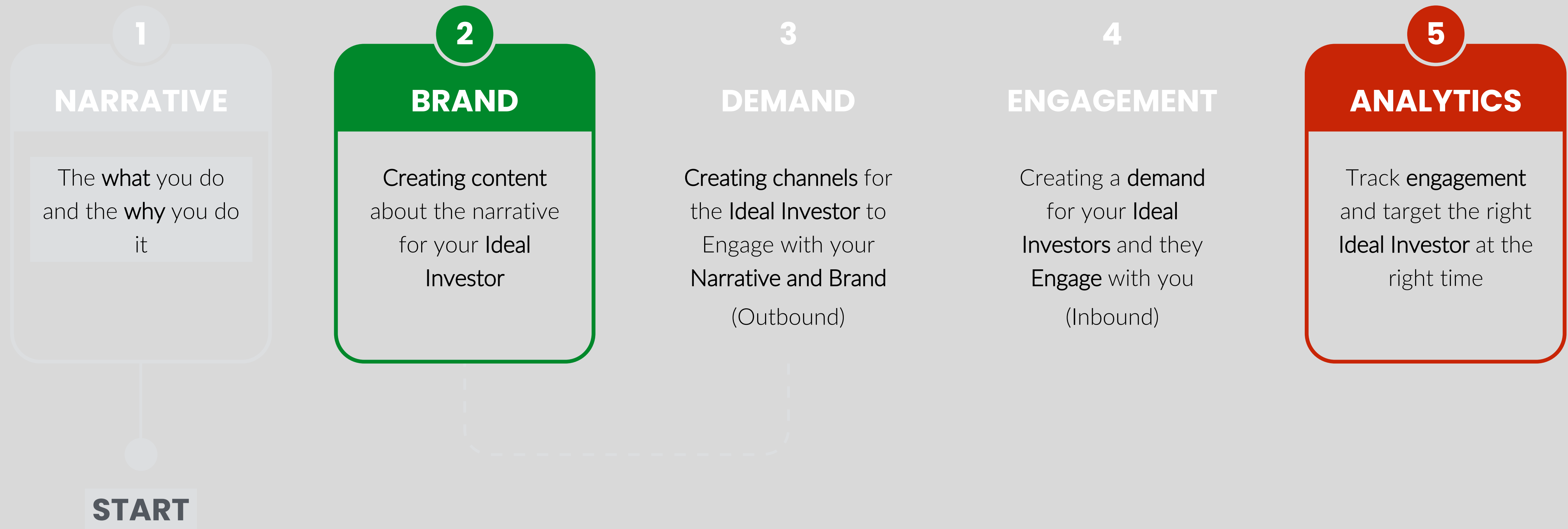


# AGTM – Automated Go To Market

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Create A Marketing Echo Chamber

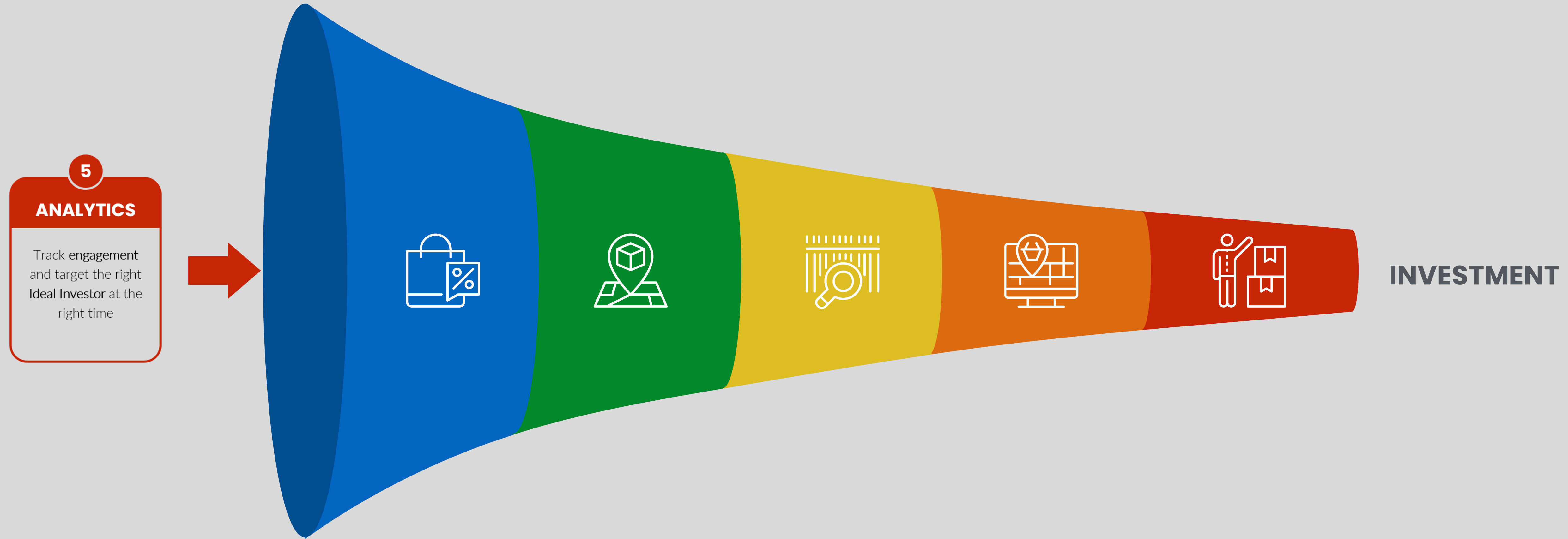
## INVESTMENT



# AGTM – Marketing Automation

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Feed the Funnel



# AI In Fund Marketing

Do or Don't – There Is No Try

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- 01 Enhanced Customer Engagement
- 02 Improved Data Analytics
- 03 Time and Cost Savings
- 04 Predictive Analytics



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To AI or Not AI


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# Personalisation

Making recommendations

To AI or Not AI



**Name**  
Yvette Lloyd

**Email**  
[yvette.lloyd@walshag.com](mailto:yvette.lloyd@walshag.com)

**Company**  
Walsh AG

**Phone**  
01220487744

**Engagement Rating**  
☆☆☆☆☆

**Website Rating**  
★★★★★

**Last Interaction**  
ZOOM::Webinar Attendance::2023-03-07  
14:00:00


## Yvette Lloyd

### Contact Activity History

[Activity Timeline](#) [Activity Type](#) [Emails](#) [Campaigns](#) [Digital Insights](#) [Print](#)

#### Activity By Device

**Devices**



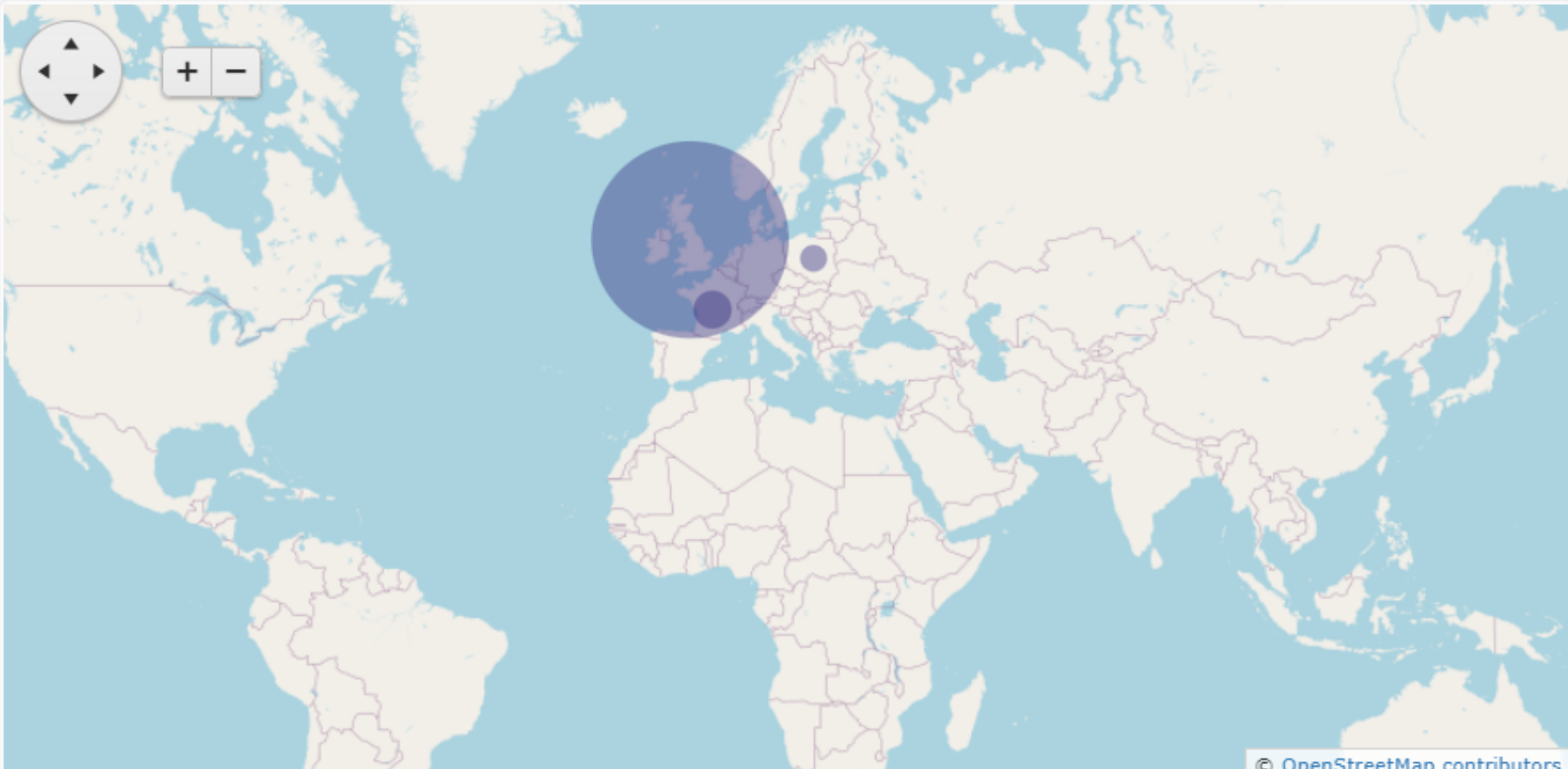
- Windows
- unknown syst...
- iPhone

#### Interests

scpf literature evolution explorer eur  
geneva vinke insights ucits awards  
positioning nguf equities funds  
archive sevf webinar posts  
willem lofoten pdf investing asset  
commentaries challenging sesf investor  
macro weekly bes april monthly  
strategic european website mitsuhiro  
factsheets yuasa commentary december

Links  
 Docs  
 Emails  
 Web  
 Campaigns

#### Activity by Location



investments

Source: [https://intelligentassetmanagement.profundcom.net/dms/Contact?Action=details&tab=digital\\_insights&email=yvette.lloyd@walshag.com](https://intelligentassetmanagement.profundcom.net/dms/Contact?Action=details&tab=digital_insights&email=yvette.lloyd@walshag.com)

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# Marketing Sentiment

Gauging the Mood of the Room

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The screenshot displays the ProFundCom website interface. At the top, there is a navigation bar with the ProFundCom logo and tagline "raising assets with marketing automation". The main content area features four circular gauges representing sentiment percentages for different asset management categories: Wealth Management (15% Negative), Asset Management (12% Negative), Investment Management (10% Negative), and Hedge Funds (91% Positive). Below these gauges, a line chart titled "Sentiment Tracking from the last 18 months" shows the ranking of these categories from December 2022 to March 2023. The chart indicates that Hedge Funds moved from a rank of 3 to 1, Wealth Management from 2 to 2, and Asset Management from 2 to 3. To the right of the main content, there are several smaller sections, each with a similar gauge and a title like "What Was the Marketing Sentiment for Asset Managers, Wealth...".

**ProFundCom**  
raising assets with marketing automation

Product ▾ Resources ▾ Customers ▾ Company ▾ Search REQUEST A DEMO

15% 12% 10% 91%

Wealth Management Asset Management Investment Management Hedge Funds

Negative Negative Negative Positive

### Sentiment Tracking from the last 18 months

2020-23 Marketing Sentiment  
Hedge Funds | Asset Managers | Wealth Management | Investment Management

Replay Scores Ranks

Dec 22 Jan 23 Feb 23 Mar 23

1 Hedge Funds 1

2 Wealth Management 2

3 Asset Management 3

Source: <https://profundcom.net/what-was-the-marketing-sentiment-for-asset-managers-wealth-managers-and-hedge-funds-in-march-2023/>

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# Content Analysis

Get a holistic view of delivery

To AI or Not AI

### Delivery Studio

Email Preview Spam Report Blacklist Report MiFID Compliance Check **Content Analysis** Inbox Preview

How can your content be improved?.

✔ You have met **2** out of **8** best practices

! There are **1** alerts

Text & Visuals 2 out of 3

Links & CTAs 0 out of 2

Typography & Text 0 out of 3

#### Text & Visuals

<b>24</b> Number of images	<b>0</b> Number of icons	Heading avg. length
-------------------------------	-----------------------------	---------------------

- You are using a lot of images, a good guideline is less than 10 Too many can sometime trigger Spam filters.

#### Things you did well

- ✔ Your images and icons are of an appropriate resolution
- ✔ Your headings are about the right length

#### Links & CTAs

<b>46</b> Tracked Links	<b>11</b> External Links	<b>0</b> Social Media Links
<b>0</b> CTAs		

- You have external links in your template. The system will be unable to track clicks to these links, consider changing them to tracked links to allow engagements to appear in your campaign stats.
- You do not link to any social media platforms. This can be an excellent way to encourage recipients to share your message.

Source: <https://intelligentassetmanagement.profundcom.net/dms/Template/index.php?Action=newpreview&ID=1978&Redirected=true> Web Viewer [Terms](#) | [Privacy & Cookies](#) [Edit](#)



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To AI or Not AI

- 01** Enhanced Customer Engagement
- 02** Improved Data Analytics
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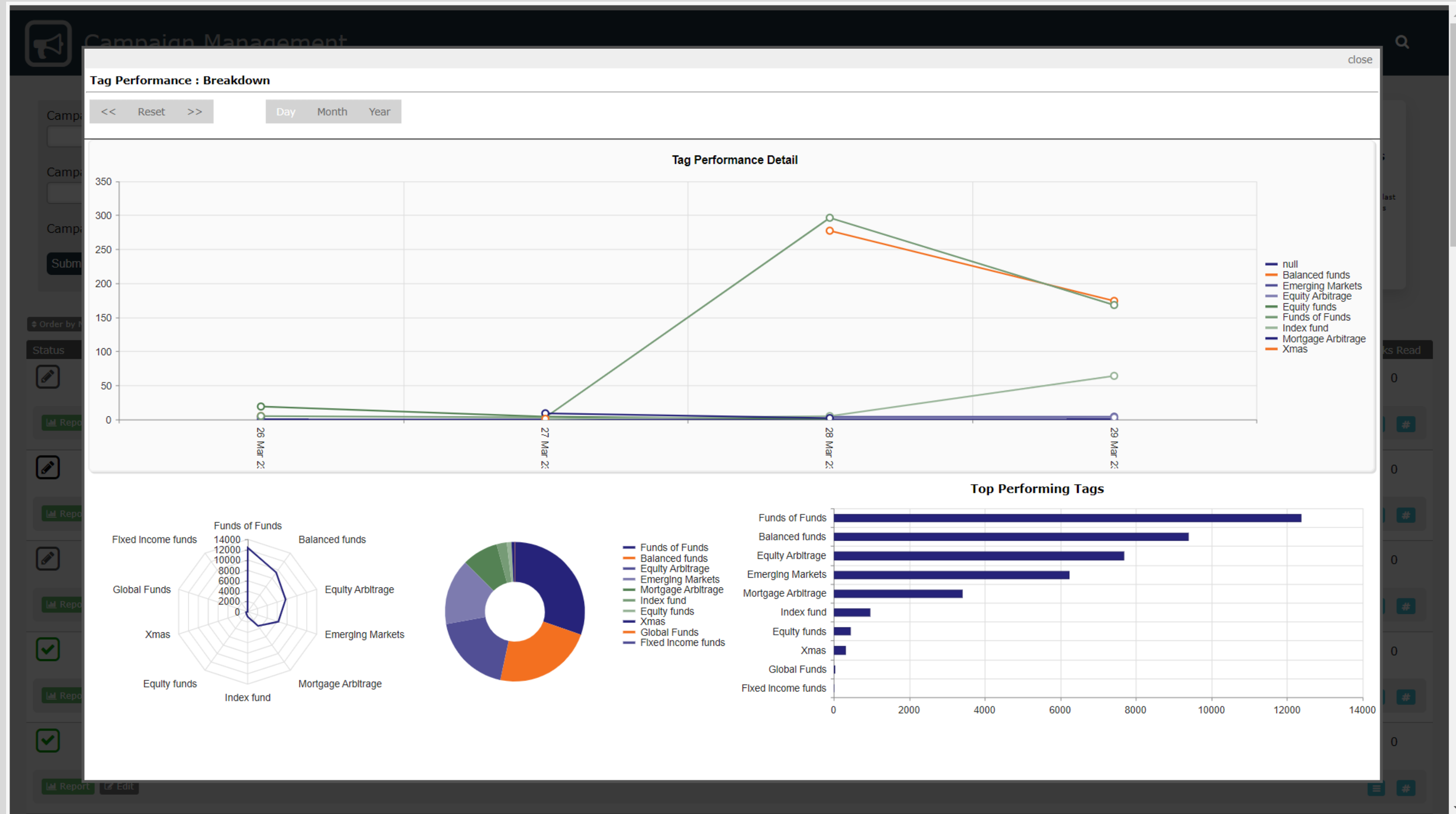
- 01 Enhanced Customer Engagement
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- 04 Predictive Analytics



# Automatic Tagging

Tag and Classify Content Automatically

To AI or Not AI



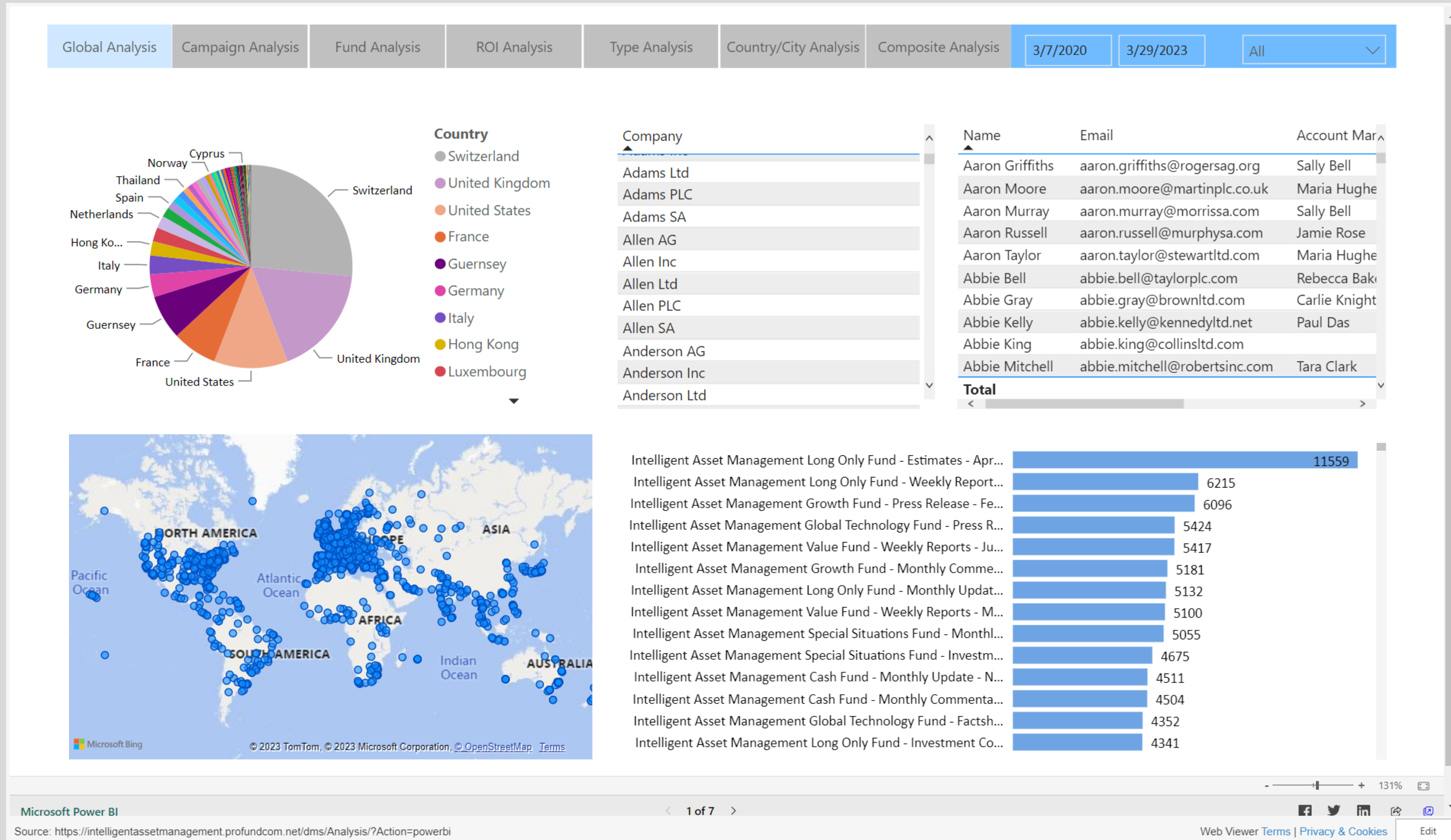
Source: <https://intelligentassetmanagement.profundcom.net/dms/Campaign/#>

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# Data Visualisation

## Track and Trace Trends



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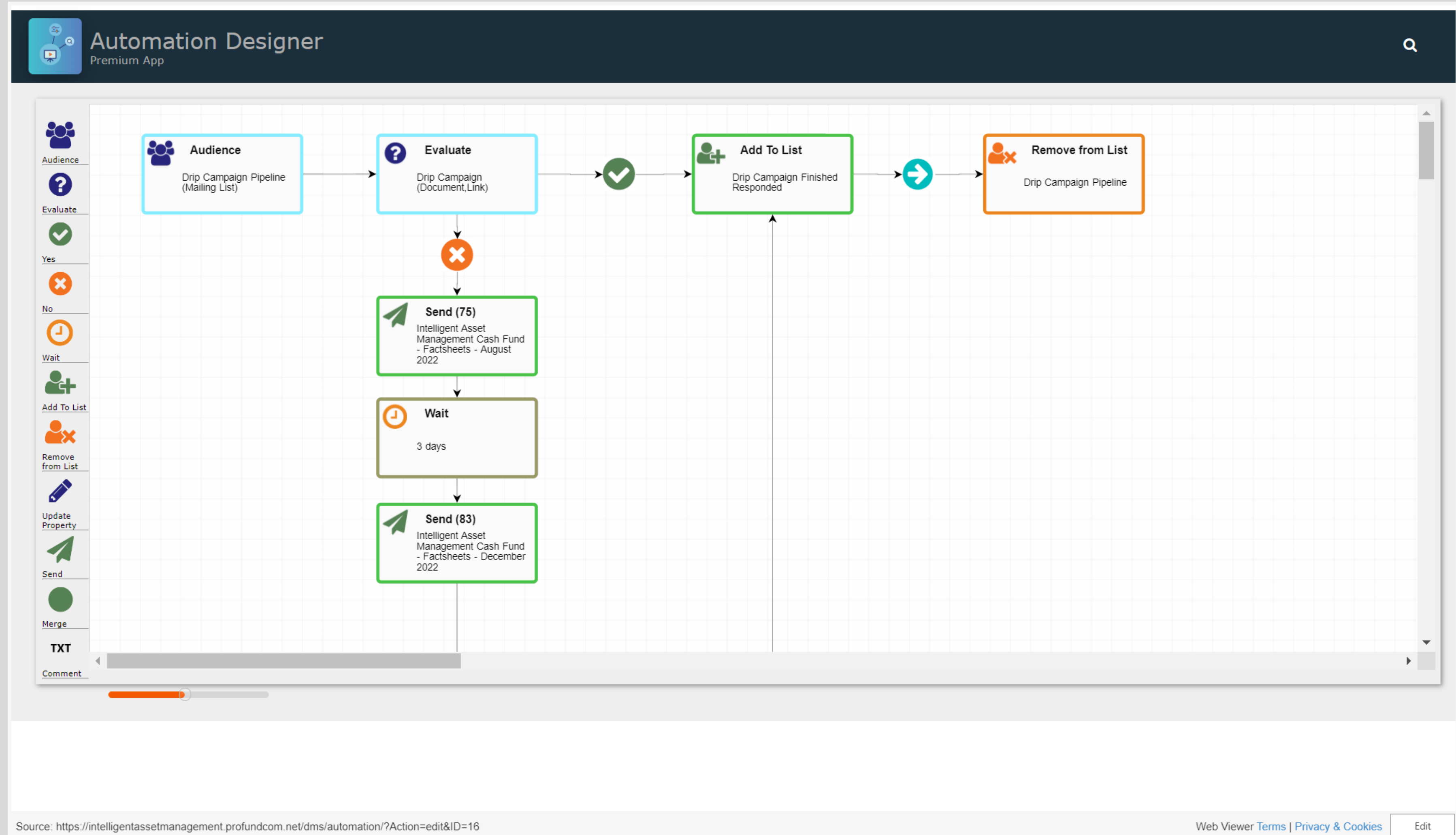
- 01 Enhanced Customer Engagement
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# Automated Automations

Small Gains with Big Impacts

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# Deliver Insights To The Sales Team

To AI or Not AI

Actionable Insights

Results in last: 90 days Account Manager: Sally Martin Fund: Global Technology Fund Campaign: All

Category	Contact	Total Visits	Engagement Rating	Website Rating	Engagements	Last Access
Low Hanging Fruit	phoebe.hunt@coxag.net	21396	★★★★★	★★★★★	📧📧📧📧📧	December 23, 2022, 5:42 pm GMT
	emily.bell@grayltd.co.uk	217	☆☆☆☆☆	★★☆☆☆	📧📧📧	December 17, 2022, 3:12 am GMT
	yvette.lloyd@walshag.com	15	☆☆☆☆☆	★★★★★	📧📧📧	December 11, 2022, 1:32 pm GMT
	eleanor.murphy@scottltd.com	436	★★★★★	☆☆☆☆☆	📧📧📧	December 9, 2022, 2:54 pm GMT
	rosie.richards@owenplc.biz	786	☆☆☆☆☆	☆☆☆☆☆	📧📧📧	December 7, 2022, 8:06 pm GMT
	william.jones@morriskt.info					
Cross-Selling	vicky.bailey@cookag.biz		☆☆☆☆☆	★★☆☆☆	📧📧📧	December 21, 2022, 9:35 am GMT
	freya.king@jamesplc.com		☆☆☆☆☆	☆☆☆☆☆	📧	December 18, 2022, 4:58 pm GMT
	mandy.rogers@woodinc.info		☆☆☆☆☆	★★★★★	📧📧📧	December 18, 2022, 4:54 pm GMT
	sean.owen@scottsa.co.uk		☆☆☆☆☆	☆☆☆☆☆	📧📧📧	December 14, 2022, 4:54 pm GMT
	tom.adams@lloydtd.biz		☆☆☆☆☆	★★★★★	📧📧📧	December 11, 2022, 7:46 am GMT
	william.jones@morriskt.info					
Redemption Risk	freya.king@jamesplc.com		☆☆☆☆☆	☆☆☆☆☆	📧	December 11, 2022, 10:12 am GMT
	claire.murphy@halltd.org		☆☆☆☆☆	☆☆☆☆☆	📧	November 20, 2022, 10:36 am GMT
	alan.rogers@russellinc.org		☆☆☆☆☆	☆☆☆☆☆	📧	December 9, 2022, 1:38 pm GMT
Marketing Alpha	fiona.allen@reynoldsltd.org		★★★★★	★★☆☆☆	📧📧📧	November 27, 2022, 6:26 pm GMT
	eleanor.murphy@scottltd.com		★★★★★	☆☆☆☆☆	📧📧📧	November 24, 2022, 4:38 pm GMT
	phoebe.hunt@coxag.net		★★★★★	★★★★★	📧📧📧	November 3, 2022, 9:51 am GMT
	erin.baker@morrissa.biz		★☆☆☆☆	★★★★★	📧📧📧	October 29, 2022, 4:37 pm BST
	alan.rogers@russellinc.org		☆☆☆☆☆	☆☆☆☆☆	📧	December 9, 2022, 1:39 pm GMT
	rosie.richards@owenplc.biz					

dakota marketplace



# Deliver Insights To The Sales Team

Better Conversations

To AI or Not AI

## Contact Management

Results in last: 90 days Account Manager: Sally Martin Fund: Cash Fund Campaign: All

Category	Contact	Total Visits	Engagement Rating	Website Rating	Recent Engagements	Last Access
Low Hanging Fruit	phoebe.hunt@coxag.net	21396	★★★★☆	★★★★★	3	March 23, 2023, 5:42 pm GMT
	emily.bell@grayltd.co.uk	217	☆☆☆☆☆	★★★☆☆	6	March 17, 2023, 3:12 am GMT
	yvette.lloyd@walshag.com	15	☆☆☆☆☆	★★★★★	3	March 11, 2023, 1:32 pm GMT
	eleanor.murphy@scottltd.com	436	★★★★★	★★★★★	1	March 9, 2023, 2:54 pm GMT
	rosie.richards@owenplc.biz	786	☆☆☆☆☆	★★★★★	1	March 7, 2023, 8:06 pm GMT
	william.iones@morrisltd.info					
Cross-Selling	freya.king@jamesplc.com		☆☆☆☆☆	☆☆☆☆☆	3	March 11, 2023, 10:12 am GMT
	fiona.allen@reynoldsltd.org		★★★★★	★★★☆☆	6	March 10, 2023, 6:42 pm GMT
	phoebe.hunt@coxag.net		★★★★★	★★★★★	3	March 2, 2023, 11:01 am GMT
Redemption Risk	freya.king@jamesplc.com		☆☆☆☆☆	☆☆☆☆☆	1	March 11, 2023, 10:12 am GMT
	alan.rogers@russellinc.org		☆☆☆☆☆	☆☆☆☆☆	1	March 9, 2023, 1:38 pm GMT
	claire.murphy@hallltd.org		☆☆☆☆☆	☆☆☆☆☆	1	February 18, 2023, 10:36 am GMT
Marketing Alpha	fiona.allen@reynoldsltd.org		★★★★★	★★★☆☆	6	March 10, 2023, 6:42 pm GMT
	phoebe.hunt@coxag.net		★★★★☆	★★★★★	3	March 2, 2023, 11:01 am GMT
	freya.king@jamesplc.com		☆☆☆☆☆	☆☆☆☆☆	3	March 11, 2023, 10:12 am GMT
	keith.collins@knightsa.org		☆☆☆☆☆	★★★☆☆	1	February 11, 2023, 7:56 am GMT

Source: <https://intelligentassetmanagement.profundcom.net/dms/Contact/?Action=leaddeck> Web Viewer [Terms](#) | [Privacy & Cookies](#) [Edit](#)



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# ProFundCom Consultation


Offer to Webinar Attendees

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Lessons in Digital Marketing for Financial Companies  
PAUL DAS

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**Paul Das**

**CEO**

**ProFundCom**

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