

Market Activation Execution Program

(External + Internal)



Outline

01 . Goals , Objective , and KPIs

02 . Persona Review

03 . Market Activation Strategy

- Strategy Pillars
- Broad Strategy Notes

04 . Phased Approach

05 . Timeline

06 . Budget

07 . Feedback



Goals, Objectives, and KPIs

01



Goals

90%

External Activation

1. Raise awareness + reputation
2. Drive user & customer acquisition

10%

Internal Activation

- Get team onboarded and excited



1. Raise Brand Awareness & Reputation

- Increase organic search traffic by 150% within the next 12 months.
- Increase LinkedIn and Twitter followers by 50% within the next 12 months.
- Increase average monthly social mentions on LinkedIn and Twitter by 50% within the next 12 months.
- Increase average monthly social shares on LinkedIn and Twitter by 50% within the next 12 months.
- Increase total average monthly social engagement on LinkedIn and Twitter by 50% within the next 12 months.

KPIs

- Drive 12,000 sessions from organic search per month.
- Increase LinkedIn followers by 120 per month.
- Increase Twitter followers by 300 per month.
- 200 mentions on LinkedIn and Twitter per month.
- 80 shares on LinkedIn and Twitter per month.
- 400 comments, replies, and/or likes on LinkedIn and Twitter per month.



2. Drive User & Customer Acquisition

- Increase website traffic by 20% YoY over the next 12 months.
- Increase app downloads by 20% YoY over the next 12 months.
- Increase average conversion rate from accreditation to funded accounts by 50% within 12 months.
- Increase average conversion rate from funded accounts to investment by 50% within 12 months.
- Lower average customer acquisition costs by 20% within the next 12 months.

KPIs

- Generate an average of 450,000 website sessions per month.
- Maintain a maximum of 20% of traffic coming from users between the ages of 18-24.
- Maintain a minimum of 50% of traffic coming from the United states.
- Generate an average of at least 400 app downloads per month.



Get team onboarded and excited

- Drive 100% new brand awareness with [redacted] employees by the end of 2023.
- Reach average monthly employee social engagement of 20% by the end of 2023.

KPIs

- Every employee must be presented the new brand by the end of the year.
- Average of 15 monthly [redacted] content shares and/or mentions by employees.
- Average of 15 employee comments, likes, or reposts per post on LinkedIn.
- Average of 15 employee likes, comments, and/or retweets per blog post or company launch tweet on Twitter.



Personas

02

Persona 1

Meet Alex



- Male investor
- Sophisticated financial knowledge
- Prioritizes portfolio growth over diversification
- Open to investing larger amounts for a moderate 4-5 year horizon

Age Range: 30-44 years old

Gender: Male

Education: Bachelor or Graduate degree

Marital Status: Married

Location: Urban area

Job Title: Senior/Director/Manager

Annual income: \$200,000+

Source: Online/forum/news with investor confirmation

Investor type: Self-directed, not interested in advisor

Level of financial investment knowledge: High level of Knowledge/Professional, very involved in community and crypto.

Most important factors when considering an ideal financial partner: Trust, Reliability & Tech Savvy tools that help better their self-directed investment ideas.

Primary Concerns: Protecting personal and financial information, transparency of investments, and easy-to-understand features and tools in the platform.

Risk Profile: High

Ethical Stance: The provider's approach to corporate social responsibility will influence their choice.

Investment horizon: Moderate-term (4-5 years)

Investment amount: 100K+

Investment strategy: Diversifies his wealth by investing in a number of cryptocurrencies and blockchain initiatives.

Investor biases: He is affected by what his peers think and do. His decisions are also affected by past performance and experience in financial markets. (Herding behavior, Recency bias)

Persona 2

Meet Matt



- Male investor
- Graduate degree
- Values stability
- Utilizes pre-IPO investments for diversification
- Seeks advisor support
- Prioritizes trust in investment partner
- Prefers smaller investments

Age Range: 35-55 years old

Gender: Male

Education: Graduate degree

Marital Status: Married

Location: Urban area

Job Title: Senior/Director/Manager

Annual income: \$200,000+

Source of information: Financial Professional

Investor type: Self-directed with advisor guidance

Level of financial investment knowledge:

Limited/moderate level of actively managing a self-directed portfolio.

Most important factors when considering an ideal financial partner:

Trust and Reliability is the most important factor, with data security and personalized service as strong seconds.

Primary Concerns: Protecting personal and financial information, easy-to-understand features and tools on the platform.

Risk Profile: Moderate

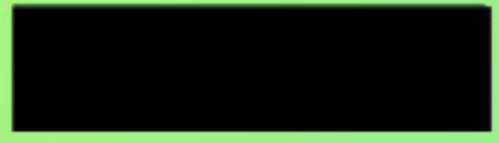
Ethical Stance: Corporate social responsibility will influence their choice.

Investment horizon: Long-term (5-10 years)

Investment amount: Under 25K

Investment strategy: Diversifies his wealth by investing in nontraditional asset classes.

Investor biases: Past performance, including narratives or ideas shared by peers, can influence him toward stories over facts, indicating a potential bias towards performance-based information. (stories to fact bias)



Market Activation Strategy

03



Strategy Pillars

01

Educate the Audience

Potential first-time investors will need to be educated on the benefits of private equity investing and knowledgeable investors will be hungry for new opportunities and insights that might impact their investments. This is a great opportunity to create thought leadership content from [REDACTED] leaders.

02

Turn Users into Influencers

Investors like Alex are energetic and passionate about the companies they've invested in. By giving them tools and opportunities to share that passion [REDACTED] can spread awareness for the platform and individual investment opportunities.

03

Keep Investors Engaged

Engaged investors are more likely to share content, engage on social media, and talk about [REDACTED] with friends and family. In order to keep investors engaged [REDACTED] needs to give them more reasons to return to the platform. Some examples would be content, investment trackers/alerts, and opportunities to interact with [REDACTED] team.



Strategy Pillars

04

Be a Responsible Renegade

This is about highlighting opportunity, not hype. ██████ should find bold and exciting ways to highlight these new opportunities in a trustworthy and responsible way. The key is to leverage content to stand out and cut through the noise while simultaneously building a strong reputation.

05

Engage Product & Channel Partner Audiences

██████ most successful content and ads have all been associated with companies on the platform. ██████ should continue to harness the energy these companies bring without relying entirely on them. ██████ should also seek out other prebuilt audiences through things like partnerships with influencers, PR, and tech integrations.

06

Amplify Everything with Social

██████ social audience is large making its social platforms an ideal distribution channel for content of all kinds. Whether it be blogs, videos, new product releases, PR, or anything in between, social media should always be considered for extending reach.



Broad Strategy Overview

01. Content Strategy

02. Thought Leadership

03. Search Engine Optimization

04. Social Media Strategy

05. Digital Advertising Strategy

01. Content Strategy

Content will be focused on educating investors, and on leveraging and creating excitement around companies on the platform.

- Education will be focused on private equity investing, and on specific industries where [REDACTED] is strong.

Most content will come from YouTube, [REDACTED] blog, and/or activation programs.

- Larger “core” content assets will be broken into smaller pieces and distributed through social channels.

Build upon and align content with [REDACTED] new Integrated Story System.

02. Thought Leadership

Thought leadership at [REDACTED] should be built from two sides that will reinforce each other over time:

1. Members of [REDACTED] team should become thought leaders
2. The [REDACTED] brand itself will become an industry thought leader

Thought leadership should focus on private equity investing, and on investing in specific industries where [REDACTED] is strong

03. SEO Strategy

There is strong competition around the typical search terms associated with private equity investing; but little around investing in specific industries

- Content should be optimized for keywords related to investing in specific industries that [REDACTED] is already invested in
- Ex) Artificial Intelligence, FinTech, Digital Assets, etc.

[REDACTED] should also compete for search terms around private investing, but this will take longer to gain traction

[REDACTED] should continue to leverage SEO to appear in searches related to companies listed on their platform



04. Social Strategy

Whenever possible, content should be shareable and create value for followers in the form of education, insights, or relevant news

Platform Prioritization

- Primary platforms will be Twitter, LinkedIn, and YouTube
- Secondary platforms will be Facebook, Instagram, and TikTok
- Strategy and content will differ slightly based on the platform

Social media should be a distribution channel used to extend the reach of activations and larger pieces of content whenever possible



05. Digital Advertising Strategy

The primary goal is to drive potential investors to the site

- Part of this goal is to drive a much higher percentage of high-quality users

The secondary goal for ads is to drive brand awareness

- Awareness will be supported by the content strategy and specific market activation programs

Ad channel prioritization

- Paid Search
 - Focused on channeling traffic interested in specific stocks
 - Focused on channeling [REDACTED] branded search traffic
- Google Display Network
- Social Ads on Twitter
- Experiments
 - LinkedIn and Meta offer great targeting option that may be helpful for reaching our personas.



Phased Approach

04

Phased Approach

1. Now

Next 6 months

2. Near

Months 7-12

3. Next

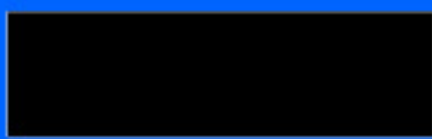
Months 13 - 24

Strategic

- Build the base of the content strategy
- Engage [REDACTED] team
- Begin building awareness
- Enhance awareness building tactics for individual companies
- Increase engagement on the platform
- Expand content strategy into new mediums
- Seek partnerships that expand audience and create value

Tactical

- Run evergreen ad campaigns to drive traffic
- Develop thought leadership
- Engage influencers and podcasts
- Updates company profiles
- Create content for [REDACTED] internal team
- Launch ad campaign designed to spread awareness for pre-IPO investing
- Launch live events designed to spread awareness and increase engagement
- Run mini campaigns designed to spread awareness for individual investment opportunities
- Educate investors through online courses
- Launch a digital publication designed to educate and engage investors
- Expand audience through tech integrations
- Spread awareness through a series of unique and noteworthy pieces of public art



Phased Approach

Now

██████████

NOW

Evergreen Campaign

WHAT: Ad campaign designed to highlight the private equity investment opportunity and position ██████████ as the easiest entry point into this new kind of investing. Ads will mention ██████████ low minimum investments and easy to navigate process.

WHERE: Google Display Network, Twitter Ads, LinkedIn Ads

STRATEGIC PILLARS: 1, 4

BUDGET: \$60,000

██████████

NOW

████████████████████

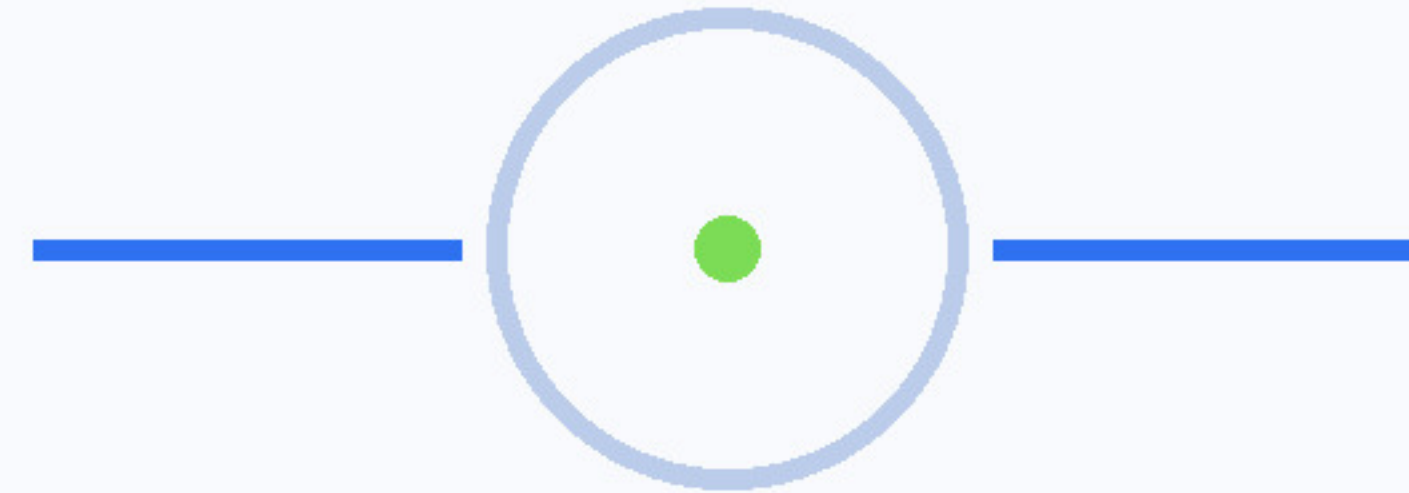
Brand Video

WHAT: A video that shows off the new brand and tells the ████████ brand's story. Designed to be shared on social media and featured on the website.

WHERE: ████████ Website, YouTube, LinkedIn, Facebook, Instagram, TikTok, and Twitter

STRATEGIC PILLARS: 1, 3, 4, 6

BUDGET: \$40,000



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██████████

NOW

████████████████████

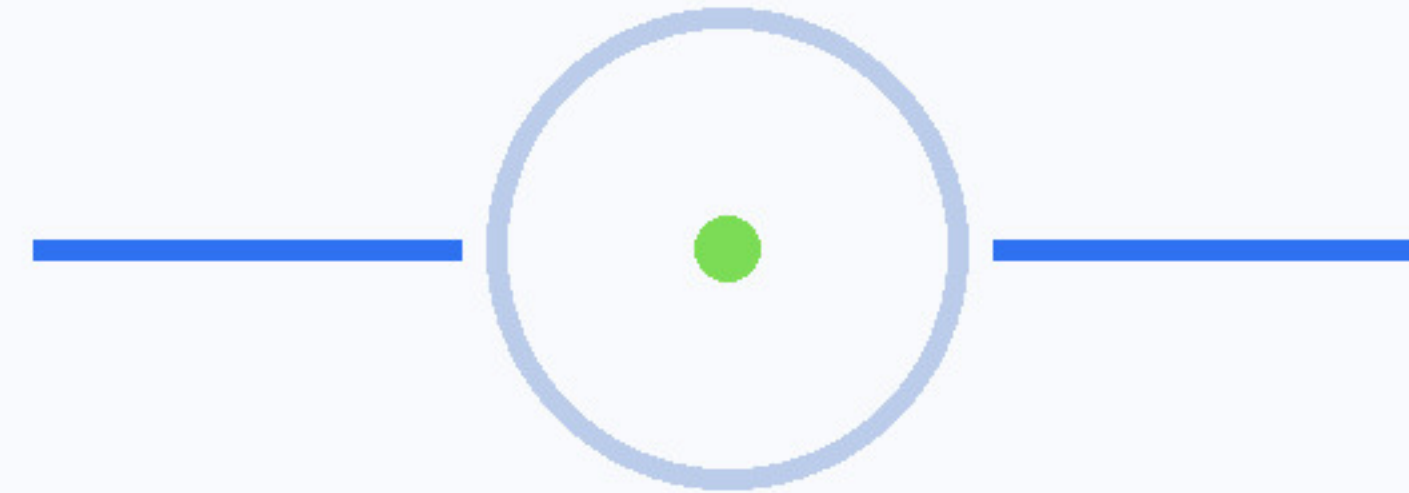
Leaders

WHAT: 20nine will work with selected leaders (3-5) within ██████████ to develop thought leadership content. Content will be distributed on LinkedIn and the ██████████ blog. The 20nine team will also pitch articles to relevant media outlets.

WHERE: LinkedIn, Blog, YouTube

STRATEGIC PILLARS: 1, 6

BUDGET: \$12,000 per month



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██████████

NOW

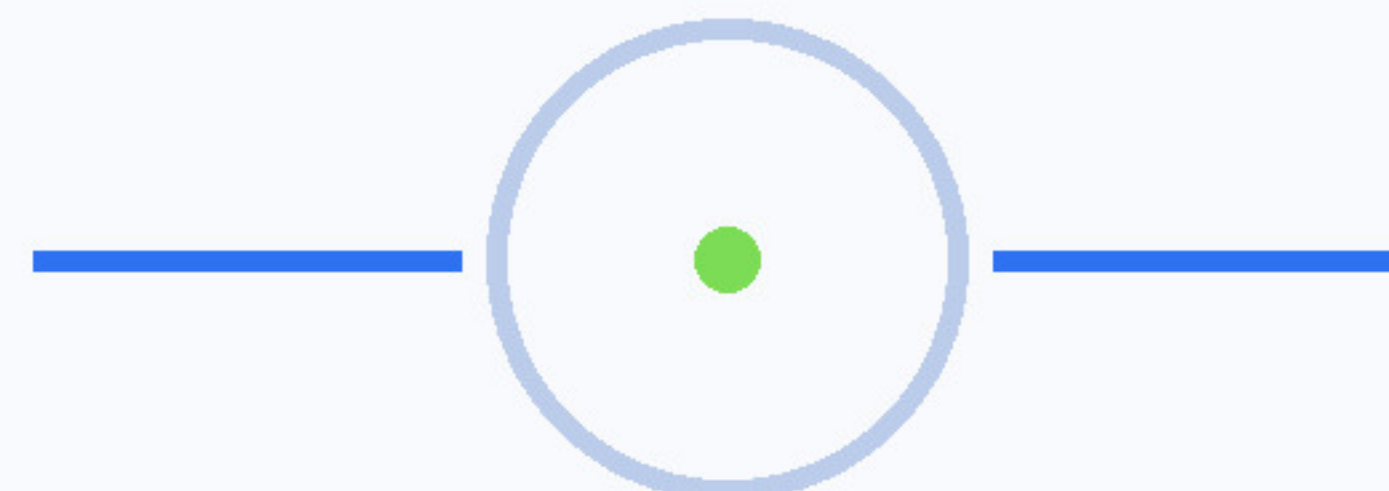
Influencer Campaign

WHAT: Engage 5 midsize investing and wealth management influencers on YouTube (100K - 500K). They will create 2 - 3 videos focused on what private equity investing is, why it's a great opportunity, and plug ██████████ as the best entry point. Points to emphasize here are ██████████ low minimum investment and easy to navigate process.

WHERE: YouTube

STRATEGIC PILLARS: 1, 5, 6

BUDGET: \$30,000



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██████████

NOW

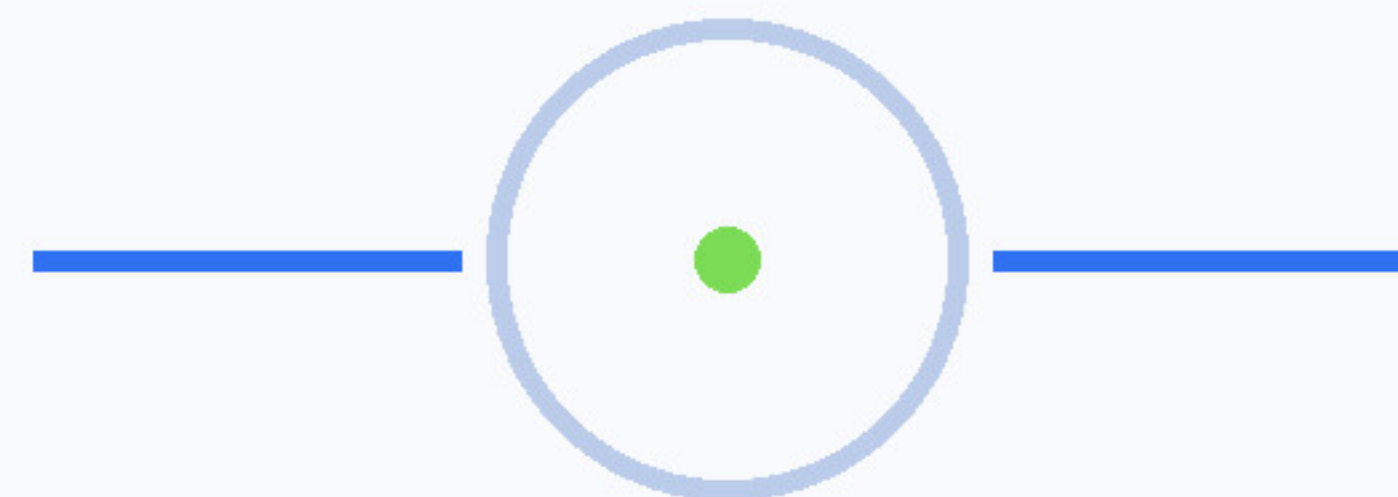
Company Profile Redesign

WHAT: Redesign the company profile pages on ██████████ platform to make them more compelling, informative, visually interesting, and ultimately shareable. With charts, visual branding, and more context around the investments.

WHERE: ██████████ website and mobile app

STRATEGIC PILLARS: 1, 2, 3, 4, 6

BUDGET: \$15,000



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██████████

NOW

██████████

Spotlight

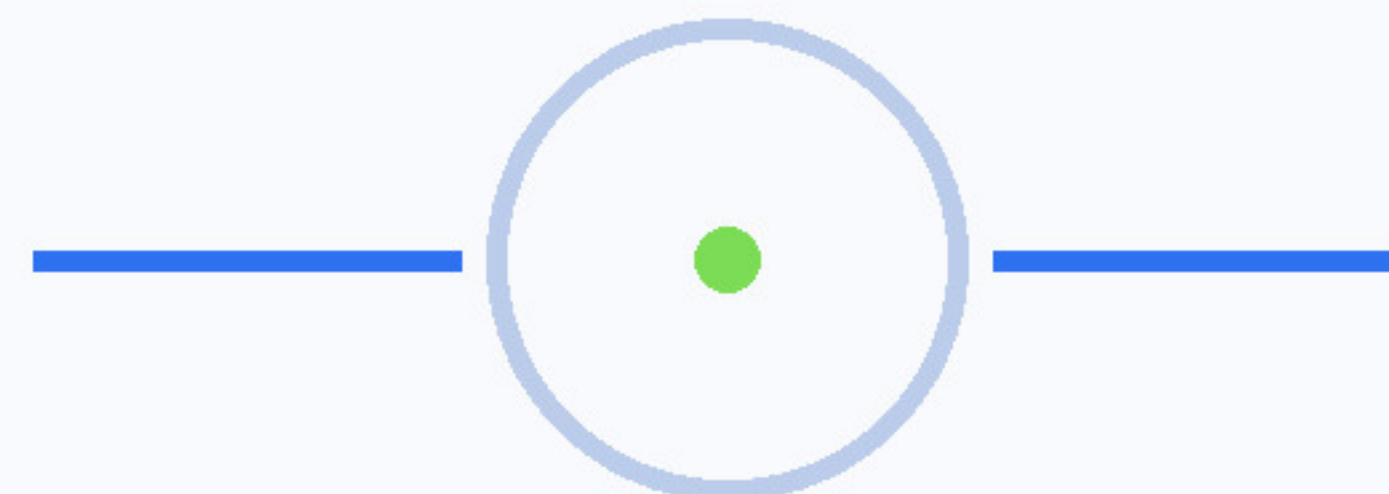
Company Profile Videos

WHAT: A series of videos (4-6) to be featured on company profile pages that will describe companies and explain why ██████████ is invested in them. Videos will feature ██████████ Leaders and can be shared on social media.

WHERE: ██████████ Website, ██████████ App, YouTube, LinkedIn, TikTok, Reels, Facebook, Twitter

STRATEGIC PILLARS: 1, 2, 3, 4, 6

BUDGET: \$18,000 per video



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██████████

NOW

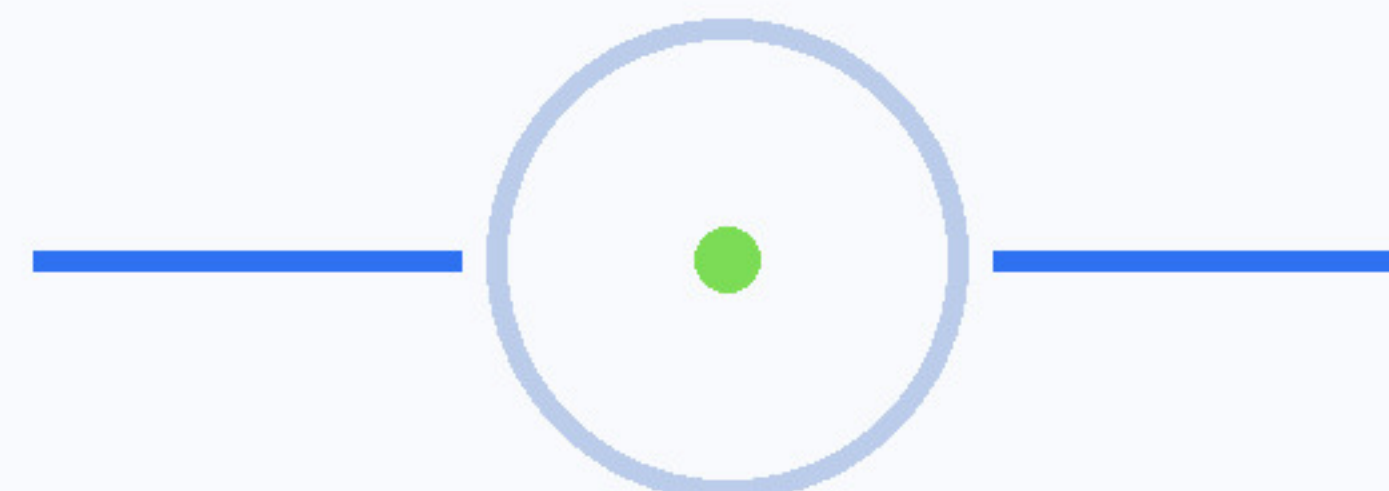
Podcast Campaign

WHAT: ██████ Leaders will appear as guests on business, investing, tech, and finance podcasts. ██████ will also pay for live read ads on 3-4 similar podcasts. The messaging will be focused around why private investing is such a great opportunity and why ██████ is an ideal entry point.

WHERE: Podcasts, YouTube

STRATEGIC PILLARS: 1, 5, 6

BUDGET: \$30,000



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NOW

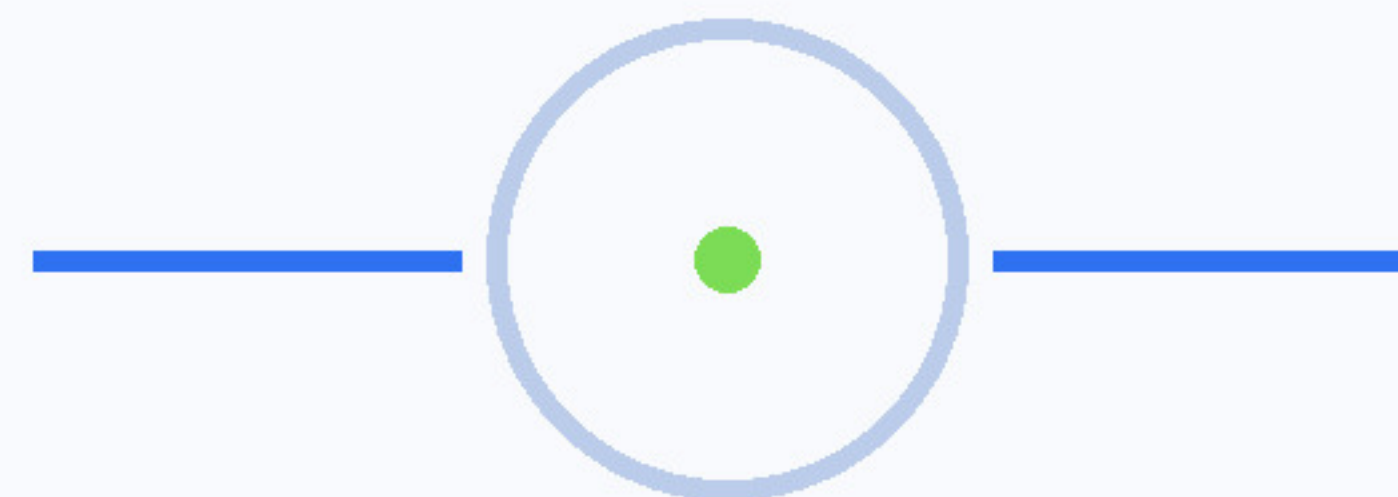
Swag Kit

WHAT: Shirts, stickers, and other gifts in a branded box experience. Designed to be gifted to employees, investors, and potential partners.

WHERE: Mail / In-Person

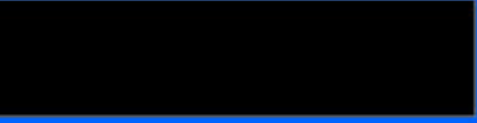
STRATEGIC PILLARS: 2, 3

BUDGET: \$10,000



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Phased Approach

Near

NEAR FOMO Campaign

WHAT: An ad campaign that appears in the context of content talking about new IPOs. The ad would highlight how much someone would have made if they were able to invest pre-IPO and then point to [REDACTED] as a way to find great pre-IPO investments.

WHERE: Twitter Ads, LinkedIn Ads, Google Display Network

STRATEGIC PILLARS: 1, 4

BUDGET: \$40,000



NEAR

Level Up

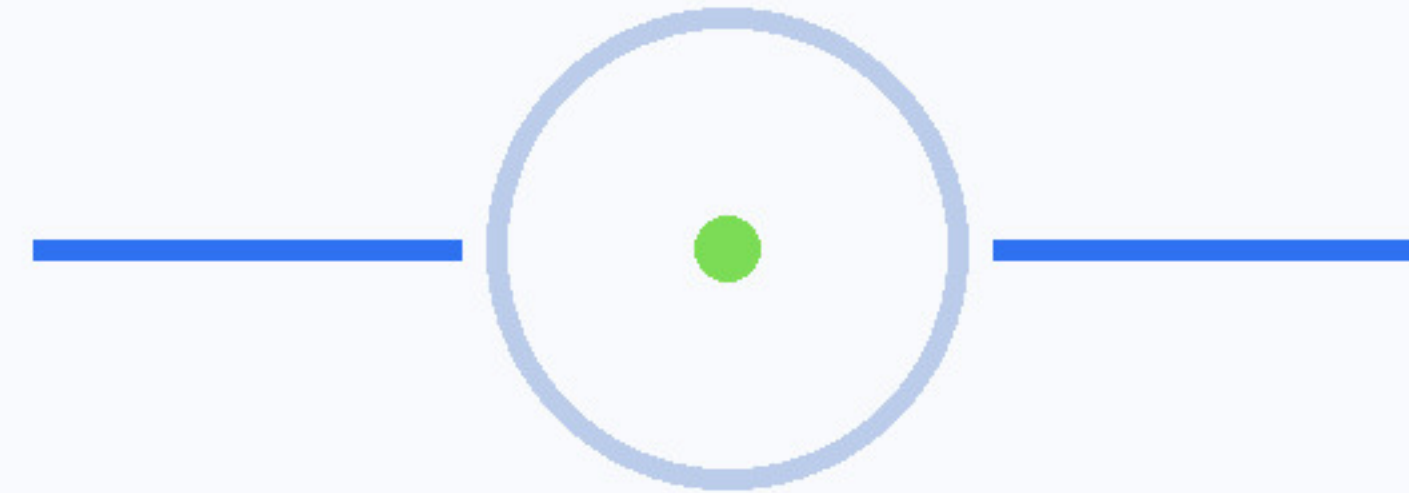
Courses for Investors

WHAT: These will be short online courses designed to educate investors on different topics in private equity investing. [REDACTED] will offer certificates for completed courses that can be added to LinkedIn profiles or shared on other social platforms.

WHERE: [REDACTED] Website

STRATEGIC PILLARS: 1, 2, 3, 6

BUDGET: \$65,000



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NEAR

Company Launch Events

WHAT: [REDACTED] Live is a series of live events that occur when new companies launch on the platform. Events will feature [REDACTED] Leaders and representatives from the launched company discussing the company, the company's future, and why they're a good investment. Events will be live streamed and there will be opportunities for member investors to ask questions.

WHERE: [REDACTED] Website, YouTube

STRATEGIC PILLARS: 1, 3, 4, 5, 6

BUDGET: \$25,000 per event



NEAR

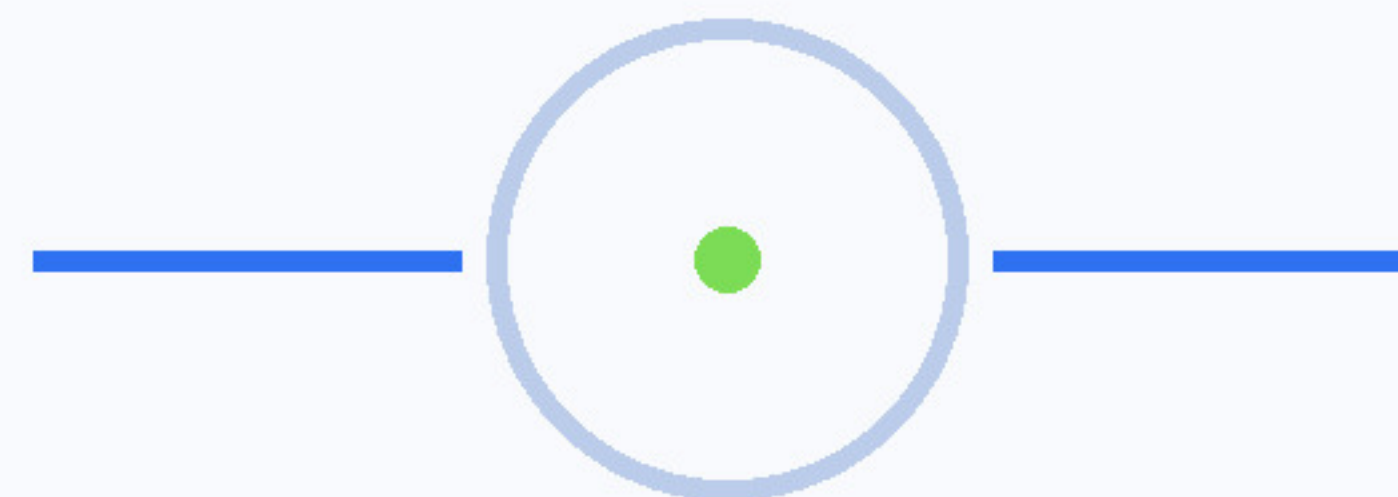
Unicorn Alerts + News Aggregator

WHAT: Company profiles will feature news from around the internet and content written by [REDACTED] that is relevant to that particular company. Member investors can sign up for alerts when there is new information on company profiles, news, price changes, etc.

WHERE: [REDACTED] Website, [REDACTED] App

STRATEGIC PILLARS: 1, 3

BUDGET: \$40,000



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Phased Approach

Next

██████████

NEXT

██████████ IQ

“Insights Quarterly” Digital Publication

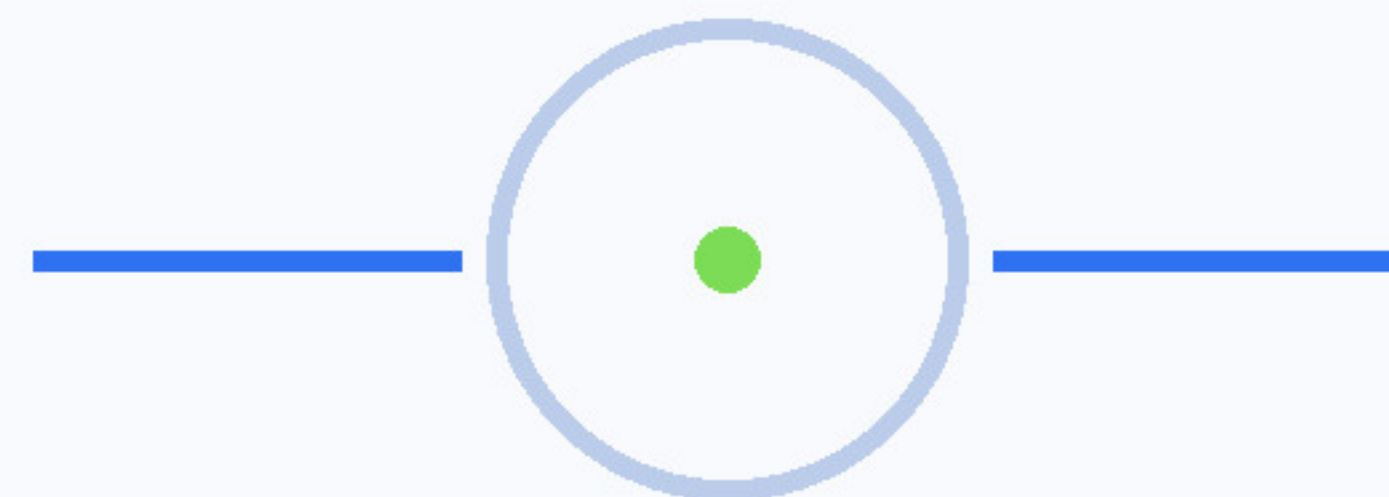
WHAT: A quarterly digital publication designed to provide concise, consumable, and highly engaging insights into what’s next in private equity investing and the industries

██████████ is most invested in. Will feature content written by ██████████ Leaders and relevant thought leaders from around the internet.

WHERE: ██████████ Website, ██████████ App

STRATEGIC PILLARS: 1, 3, 4, 6

BUDGET: \$35,000 per publication



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NEXT

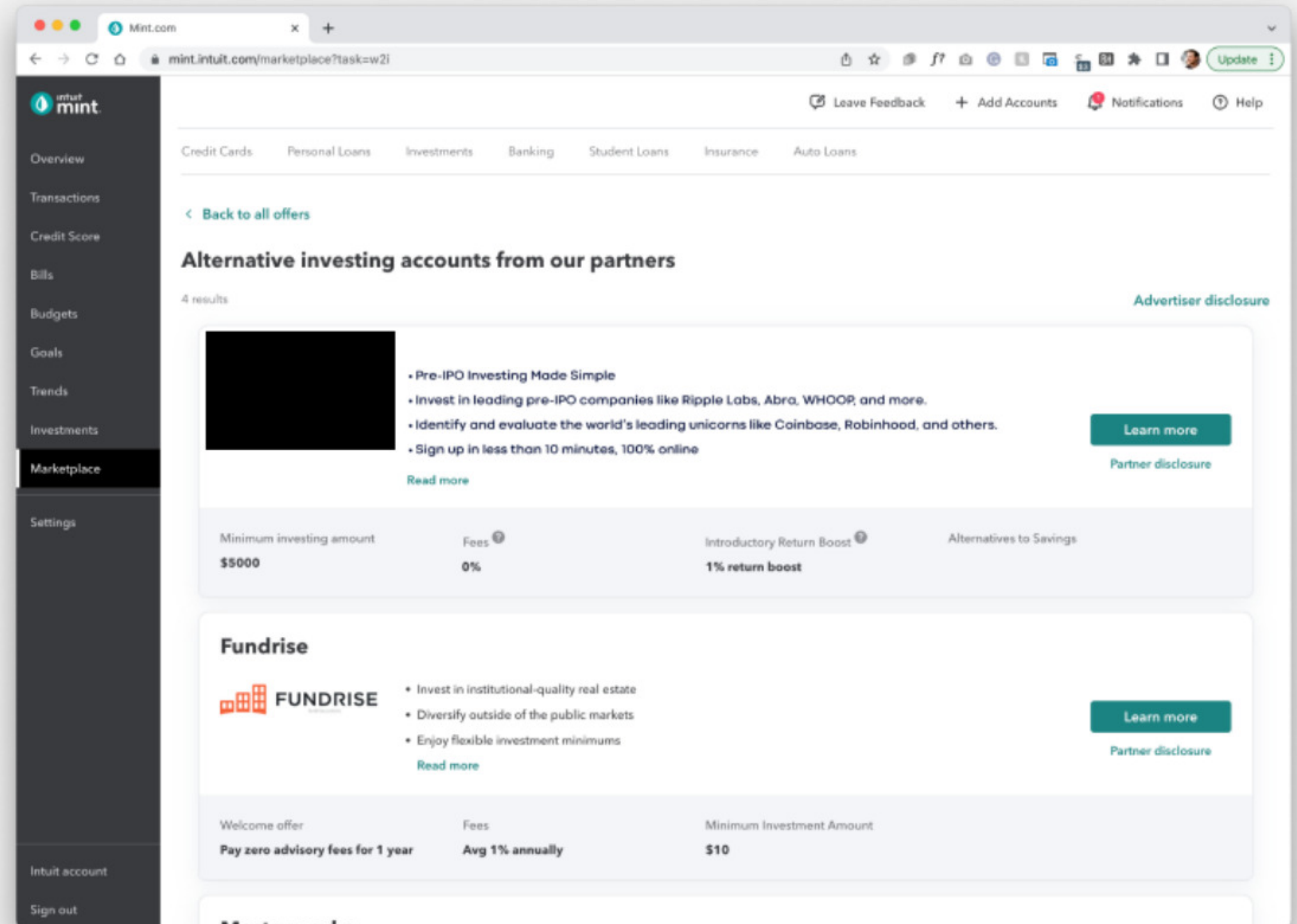
Tech Partnerships

WHAT: Tech integrations and partnerships with personal finance apps like Mint and Rocket Money that are designed to expose [redacted] to a large audience and build reputation through association with trusted brands.

WHERE: Various Investing and Personal Finance Apps

STRATEGIC PILLARS: 4, 5

BUDGET: TBD



██████████

NEXT

Unicorn Hunt

WHAT: Unicorn murals with AI generated “hidden” QR codes that lead to landing pages where first time investors are offered ██████████ Bucks. Murals will be placed in neighborhoods where Alex and Matt are likely to live. The campaign will be supported by geotargeted social ads, organic social content, and an influencer campaign.

WHERE: High income neighborhoods in New York, San Francisco, LA, Chicago, and Miami

STRATEGIC PILLARS: 4, 6

BUDGET: \$20,000 per location





Timeline

05

Now

First 6 Months

Near

Months 7 - 12

Next

Months 13 - 24

New Content Strategy

Evergreen Campaign

██████ Leaders

Influencer Campaign

Company Profile Redesign

██████ Lowdown

Podcast Campaign

██████ Brand Video

██████ Swag Kits

FOMO Campaign

██████ Learn

██████ Live

Unicorn Alerts

██████ Next

Tech Integrations

Unicorn Hunt



Budget

06

Budget

Now First 6 Months

- **Paid Media - \$300K**

- Paid Search - \$220,000
- Google Display - \$40,000
- Twitter - \$20,000
- Other Channels - \$20,000

- **Activations - \$260K**

- ██████ Leaders - \$60,000
- Influencer Campaign - \$30,000
- Company Profile Redesign - \$15,000
- ██████ Lowdown - \$75,000
- Podcast Campaign - \$30,000
- ██████ Brand Video - \$40,000
- ██████ Swag Kits - \$10,000

Near Months 7 - 12

- **Paid Media - \$600K**

- Paid Search - \$400,000
- Google Display - \$100,000
- Twitter - \$60,000
- Other Channels - \$40,000

- **Activations - \$390K**

- ██████ Leaders - \$60,000
- Influencer Campaign - \$30,000
- ██████ Lowdown - \$75,000
- Podcast Campaign - \$30,000
- FOMO Campaign - \$40,000
- ██████ Level Up - \$65,000
- ██████ Live - \$50,000
- Unicorn Alerts - \$40,000

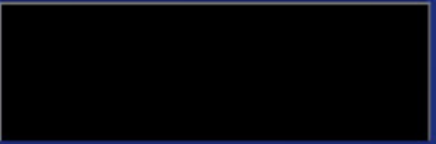
Next Months 13 - 24

- **Paid Media - \$1.2M**

- Paid Search - \$780,000
- Google Display - \$200,000
- Twitter - \$120,000
- Other Channels - \$100,000

- **Activations - \$445K**

- ██████ Leaders - \$60,000
- Influencer Campaign - \$30,000
- ██████ Lowdown - \$75,000
- Podcast Campaign - \$30,000
- FOMO Campaign - \$40,000
- ██████ Level Up - \$65,000
- ██████ Live - \$50,000
- ██████ IQ - \$35,000
- Tech Integration - TBD
- Unicorn Hunt - \$60,000



Next Steps

Feedback Due - 7/5

Round 2 Presentation - 7/12



Thank You