



Emerging Manager Focus

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VALUATION - FEATURE STORY

Dapper Analysis: A Small-Cap Manager with Large-Scale Ambition



In 2003, a Maryland-based small-cap growth manager that had grown to \$250 million in assets in four years

through referrals and friends-and-family relationships decided to move from a direct-sell to an advisor-sell model. Senior managers, however, weren't certain which products or which kinds of clients would offer the best opportunity for growth.

The strategy's performance had consistently beaten the Russell 2000 Growth Index, yet its portfolio management team was unknown and the company had no industry recognition. Its marketing materials and sales approach were heavily focused on performance, but did not clearly differentiate the company or provide the level of detail on culture, organization, and process that advisors and clients would require in their due diligence processes.

In April 2003, the company engaged Jeff Briskin to implement a full DAPPER Analysis to help it re-engineer its sales and marketing strategy. Over this three month engagement, Jeff:

- Met with members of the senior management team, portfolio analysts, operations, compliance and client service specialists, and salespeople to identify the company's DAPPER strengths and development needs
- Compared the identified information against similar-sized competitors to identify competitive edges and gaps
- Researched and identified sweet-spot opportunities in the small-cap market
- Presented the DAPPER Analysis results to senior managers with a recommendation that the company focus its efforts on gaining a foothold on separate-account platforms aimed at mid-market institutions, which could provide for greater return-on-investment results than a mutual fund strategy.

Senior management concurred with the strategy, and engaged Jeff to create its value proposition and branding and work with its marketing vendors to re-develop its print and online marketing materials, RFPs and pitchbooks and train its sales team on the fundamentals of selling to fiduciary platforms.

Results: By the time the manager was acquired by another asset management firm in July 2006, the strategy was featured on five separate-account platforms and assets had grown to \$3.2 billion.

Overview of DAPPER Analysis

Created by veteran marketing professional Jeffrey Briskin, DAPPER Analysis is a comprehensive program that delivers greater visibility and sales and marketing effectiveness for strong-performing firms that are having difficulty gaining traction in a highly competitive marketplace. DAPPER Analysis combines competitive research and industry analysis with in-depth interviews with the firm's senior management team, product and client service managers, and sales and marketing professional to gauge their strengths and development needs in six key areas:

- D = Differentiation
- A = Attribution
- P = Process

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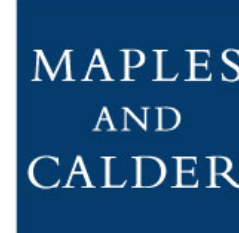


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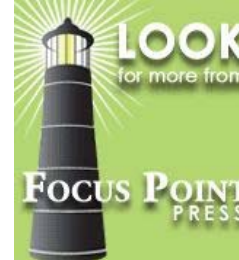
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HYPOPORT

THE FINANCE INTEGRATOR

Wed, 21 Oct 2009 14:05:15 GMT	P = Pedigree E = Endurance R = Relevancy
Matt McCall: Playing The Next Great Bull Market Wed, 21 Oct 2009 14:05:15 GMT	The process can also incorporate analysis of documentation, marketing and sales materials, client communications and outside media coverage to build a comparison of the how staff members perceive the firm versus the 'face' it presents to its clients and the general public.
Inflation Scorecard: Oil Shoe Drops Wed, 21 Oct 2009 14:05:15 GMT	Generally, a DAPPER Analysis project takes between 2-3 months to complete and requires participation from members of all functional areas of the firm. When completed, the firm receives a comprehensive report, an executive summary, and recommendations for leveraging the data to reengineer sales and marketing process.
HAI In The News Wed, 21 Oct 2009 14:05:15 GMT	To learn more about DAPPER Analysis, contact Jeffrey Briskin.
Bottoming In Inflation Data Wed, 21 Oct 2009 14:05:15 GMT	Briskin Consulting 55 Park Avenue Natick, MA 01760 508-934-6252 jeffbriskin@hotmail.com
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