



## 5 TOPICS FOR YOUR MUTUAL FUND'S ANNUAL STRATEGY SESSION

As 2017 nears its end, 2018 is now the focus for most businesses. Reviewing the year that is closing and developing an actionable strategic plan for the year ahead is key to achieving success.

So if you're a mutual fund company in the planning stages for 2018, what should you be thinking about for the new year? What should you be discussing with your team? What sales and marketing topics should be on the agenda?

At Havener Capital Partners, we are gearing up for our annual strategy session here in Newport. As a partially virtual office, our third party marketing team gathers here at our home base in **Newport, Rhode Island** where some of us work every single day. For the virtual teammates, it's an off-site meeting, but to give that perspective to our Newport team, we host much of the meeting outside the office. Not only are we together to review 2017 and discuss 2018, but we are together to unite our team, to strengthen our culture and to have some fun!

You know Newport in the summer, but do you know **Newport in the winter**?? Don't snooze on it, friends. It's like starring in a Hallmark movie or walking around in a Norman Rockwell painting. We'll share photos and snippets of our activities on our Twitter and Instagram accounts. Follow us there!

**SO, HERE'S AN OVERVIEW OF SOME OF THE SALES AND MARKETING TOPICS WE WILL BE DISCUSSING AS IT RELATES TO OUR MISSION OF HELPING OUR ROCKSTAR CLIENTS GROW THEIR MUTUAL FUNDS.**

## 5 TOPICS TO DISCUSS

- Is there a theme you want to embrace for the new year?
  - ◊ For us in 2018, it's the concept of connecting. We continue to expand the ways we help undiscovered mutual funds and, simultaneously, we want to be an even more powerful source of mutual fund ideas for RIAs and family offices.
  - ◊ Perhaps find podcasts or books you could listen to or read as a team and then discuss.
- Review the highlights and challenges from 2017: What worked, what didn't. Break it down by mutual fund strategy, by team, and then also at the high level of the overall firm effort.

- Translate that review of 2017 into actionable ideas for 2018: Given your review, how can your sales and marketing efforts be improved? Do you need new tools, marketing strategies, new team members, new mutual fund products?
- If you are embracing a content strategy, discuss your best performing blogs, commentaries, events, content offers. Why did they work so well? What topics did you discuss and can you build on them for 2018 to generate more leads?
- Find some ways to laugh. Reviewing and strategizing saps your brain power. It can be a roller coaster of emotional ups and downs. Don't beat yourself or your team up too much. Your growth strategy is a work in progress and your squad is there to help you. Find ways to high five- celebrate the wins and each other.

It's important to have a strategic plan to guide your sales and marketing effort in 2018. Unless of course, you have no goals, no dreams, no vision for the future. If that's the case, we recommend you [watch this movie](#) with your team.

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#### About the Author



**Stacy Havener** is the founder of Havener Capital Partners, providing her sales and marketing expertise to a select group of high quality managers. Well recognized in the Registered Investment Advisor and wealth management channel, Stacy has significant experience in product development as well as raising assets through successful distribution strategies. Based in Newport, RI, Stacy balances her career with her love of travel, passion for cooking, and an addiction to crossword puzzles.

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