

WHITE MARBLE

Are you making the most out of your MarTech?

New MarTech functions relevant
for investment marketers

US Investment Marketing Trends
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Introduction

It's the dog days of summer. Amid the heat and humidity, well-deserved vacations are being taken and the office may feel like a ghost town.

For those who aren't relaxing at the beach, these (hopefully) lighter days are a great time to look at the foundational tools that your marketing teams rely on, to evaluate if they are delivering the most return on investment.

Tools like your CRM, your analytics platform, and even your social media channels are vital to achieving marketing success. Further, these tools are constantly releasing new updates that aim to give their customers greater efficiency and capabilities.

For investment marketers, it may feel difficult to parse through these updates – many of which can feel like they don't fundamentally apply to investment audiences - and determine what makes sense for our specialized, highly-regulated industry.

To help, White Marble Consulting's [US Trends team](#) decided to devote this quarter's edition to researching interesting updates from common MarTech tools used by our client base of asset and wealth managers. Below, we've put together a guide of what we found to help you get the most out of your technology.

Don't worry, we kept it short – so you can get to your summer Friday ASAP.



Salesforce's Einstein Copilot can facilitate more seamless interactions

Customer relationship management platform Salesforce continues to refine its in-platform AI assistant, Einstein Copilot, since its release at the beginning of this year. This includes updates specifically targeted to the financial services industry.

Asset and wealth managers are rightfully very cautious in terms of integrating AI. However, Salesforce offers AI-powered features that are worth exploring internally, with appropriate governance and a “human in the loop” to ensure accuracy and appropriateness. Crucially, through Einstein Copilot, users can interact with these features via natural language, making it a more seamless engagement.

Examples of Einstein Copilot features that may make sense for investment marketers to test include:

- Automatically summarizing client records across systems, to create more comprehensive understanding of clients' needs and engagement with the firm
- Generating a first draft of email communications to then edit and build upon
- Automated lead scoring through Einstein Engagement Scoring, to more quickly identify Marketing Qualified Leads to pass on to the sales team
- Automated audience segmentation and list building, to create a first draft that you can then verify

However, as with all CRMs, the value of these outputs is dependent on the accuracy and robustness of the data being inputted into Salesforce.

Adobe's AI capabilities can add efficiency to investment marketing operations

Adobe has announced several updates for its Illustrator and Photoshop apps that could drastically increase the productivity of in-house creative teams at firms. Recent enhancements include:

- Generative Shape Fill in Illustrator, which allows users to fill any existing shape with new colors or patterns using natural language text commands.
- Retype in Illustrator, which automatically detects text in a static image and makes it editable.
- A Contextual Toolbar in Illustrator and Photoshop, which automatically updates to include relevant buttons, imagery, and next steps for a project – reducing time spent looking for where to click.

Adobe has also added features that can boost marketing operations to other applications in its suite:

- In February, Adobe announced a new AI Assistant to its Reader and Acrobat applications that can automatically read and generate summaries of long PDFs. Have you ever spent time writing an email that summarizes an investment commentary? This tool can help provide a starting draft. Security is obviously a top consideration – but Adobe says they've taken high precautions: “The company assures customers that data security protocols govern the new AI Assistant feature. No customer document content is stored or used to further train the technology,” reports ZDNet.
- Adobe's digital asset management tool, AEM Assets, added a “content hub” feature. Firms struggling to organize and make full use of all the content and assets their sales and marketing teams create can benefit from its features:
 - Seamlessly search and browse for assets using automatically detected smart tags.
 - Use the integrated light-weight content creation and editing functionalities within the hub, which allow marketers to easily create multiple versions of assets for different audiences, while keeping them all organized. For example, this can be useful for asset managers looking to customize content for different audiences, such as both advisors and private clients.
 - Flexibly manage permissions for sensitive assets and apply governance controls.

HubSpot continues to improve email, AI capabilities

HubSpot, another customer relationship management platform, continues to refine its capabilities. Many asset and wealth managers use HubSpot for email marketing.

Before looking at updates, firms should first closely evaluate their current use of HubSpot and make sure they are fully utilizing its existing features.

Fundamental HubSpot email marketing capabilities:

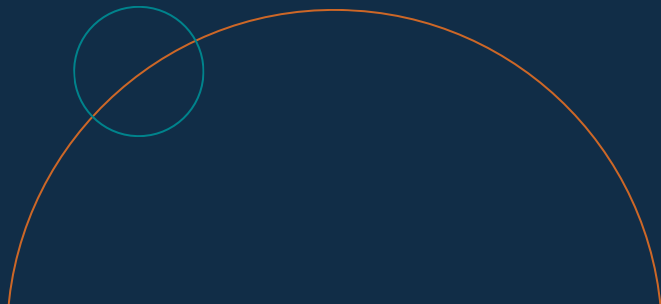
Personalization and segmentation: Segment your audience based on various criteria such as product interest, lifecycle stage, and previous engagement. Personalize emails to cater to specific segments, enhancing relevance and engagement.

Automation: Set up automated workflows, triggered sends, and scheduled emails to ensure timely communication with your audience.

A/B Testing: Test different versions of your entire emails, including subject lines and visuals, to see which performs better, allowing for data-driven improvements.

Analytics and reporting: Track key metrics such as open rates, click-through rates, and conversions. Leverage the reporting function which provides detailed reports to help optimize your email campaigns.

Seamless integration with HubSpot's CRM: Seamlessly integrates with HubSpot's CRM, to better track and personalize marketing efforts based on customer data.



Once your firm is making full use of the fundamentals of HubSpot's email marketing capabilities, you can look to new features, which include:

1. Enhanced goal setting and tracking

HubSpot introduced a new Goals feature that helps set, track, and achieve marketing objectives – including for email - directly within the platform. This update includes templates for different types of goals, making it easier to manage and monitor progress.

2. Improved metrics

The platform now shows more accurate email metrics by displaying both “bot-included” and “bot-excluded” email open and click rates.

Similar to Salesforce and Adobe, HubSpot has also released AI-powered content features. CX Today reported on these, sharing that HubSpot's Content Marketing Software now offers:

1. AI Content Creation to simplify the creation of high-quality multilingual content – from brainstorming ideas to writing blog posts and crafting images.

2. Content Remix to effortlessly generate a complete content pipeline from a single asset.

3. Brand Voice to establish and produce content with a uniform brand tone across various channels – including blogs, social media, and email.

4. Audio Tooling to create, host, and distribute podcasts and post-narration, transforming text into audio to improve content accessibility.

5. Blog and Gated Content Library to oversee content, provide premium content, and effortlessly capture leads.

Again, all asset and wealth managers should approach AI-generated content cautiously. However, White Marble believes that AI content features like HubSpot's can inject efficiency into marketing processes by serving as a useful starting point.

For example, marketers looking to promote a blog post may spend time writing multiple social posts for it. Now, HubSpot's Content Remix can generate starting drafts of those social posts, for the marketer to then thoroughly review and edit.

Marketo enhances webinar, engagement functionality

Marketo, the marketing automation software acquired by Adobe, has released several functionalities relevant to investment marketers who use its events and data capabilities:



Their platform **now supports on-demand webinars**, rather than just live events. Marketers can now see a summary of the visitors that watch a recording after the event, giving them a more comprehensive understanding of their engagement and how to follow up.



New data attributes have been added to the Marketo REST API. Marketers who use this API can now retrieve **more activity data** from across their digital content. New attributes included insight on the type of device used to access, the browser, and the operating system. While granular, this type of information can, for example, inform how to optimize the structure or design of an email or landing page.



New Audit Trail capabilities allow marketers to better see how and where their organization is using data exports. As news publication [MarTech](#) put it, “Ever wonder how much of your database is being exported from Marketo and floating around in .csv or Excel files? The Audit Trail will now show a record of the size of any lists or Smart Lists exported from Marketo.” This is a potentially useful feature as investment marketers prioritize compliance and recordkeeping.

Beacon offers personalized reports, new dashboard for investment marketing analytics

Beacon is White Marble Consulting's digital marketing benchmarking tool exclusively for the investment management industry. The tool is a data hub for marketers wanting to understand what types of engagement are coming through to their website, how their email marketing is performing, how well their social media channels are performing and more – all displayed against their industry peers.

Last year, the Beacon team launched **personalized reporting**, and every participating firm now receives a curated collection of firm-specific data insights each quarter.

This year, the Beacon team built a new website that offers users:



Peer group selection: Select your peer group to compare data more effectively. This personalized comparison tool helps you benchmark your performance against your competitors.



Instant key data points: Get an instant overview of crucial data points right from your dashboard.



Interactive charts: Toggle data and companies on and off to focus on the information that matters most to you.



Team invitations: You can now invite other team members to join Beacon to share insights and work together more efficiently.



Quicker data loading: Data now loads much more quickly on the first viewing and instantly on subsequent views.



Enhanced benchmarking: Benchmarks are now populated from your selected peer group.



Persistent chart states: Chart options now stay when browsing between charts and pages. For instance, if you prefer viewing EU data, simply select it once, and your preference will be remembered across all charts.

[Learn more about Beacon](#)

LinkedIn enhances newsletter, campaign features

Lastly, we looked at LinkedIn, the most popular social media channel for asset and wealth managers. LinkedIn is a powerful tool for both sales and marketing, and many firms are not using it to its fully potential.

Some exciting enhancements we've been keeping an eye on include:

1.

Multiple newsletters

LinkedIn now allows the creation of multiple newsletters from a single account, enabling investment marketers to cater to different audience segments with tailored content.

2.

Accelerate for campaign creation

LinkedIn's Accelerate tool provides end-to-end campaign recommendations and automatic optimizations, helping marketers quickly set up and refine their campaigns to reach the right B2B audience.

3.

AI-Powered Tools

The new AI-assisted search, as well as AccountIQ in Sales Navigator, improve lead prospecting and account research, allowing marketing and sales to enhance their relationships with prospects.

4.

Enhanced LinkedIn Pages

New features like competitor analytics provide deeper insights and more interactive engagement opportunities.



Unleash your technology's potential

In today's digital world, strong use of marketing technology is the foundation for success.

Investment marketers should look closely at their tech stack and evaluate if they are using it to its full potential. White Marble Consulting has an experienced team devoted to helping asset and wealth managers optimize their digital infrastructure - [learn more](#).



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