

# Peer Insights

## R E P O R T

### Q&A with Andrew Corn

#### CEO of E5A Integrated Marketing

#### Principle Series:

*Family Office Insights sits down with Andrew Corn, CEO of E5A Integrated Marketing, to talk about his storied career and the power of marketing in the investment industry.*



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Family Office Insights is a voluntary, “opt-in” collaborative peer-to-peer community of single family offices, qualified investors and institutional investors.

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[FamilyOfficeInsights.com](http://FamilyOfficeInsights.com)

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**Q:** Why is raising capital in 2015 a whole new frontier?

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**A:** There are two reasons why it's different. The first is data. Data allows far more precision targeting than ever before. Managers have always understood that family offices are a very good prospect, but they had trouble distinguishing between single-family offices and multi-family offices and those who use investment consultants, and so on. But now the data is much clearer. The second thing is that there are far more choices than ever before when it comes to the type of technology used to reach people. Keeping conversation going with thousands of people simultaneously with everyone at different stages of the conversation is no easy feat. Imagine going to a party to tell a story and everyone arrives at a different time. They all ask questions at different times, but somehow you still wind up engaging them fully and being able to get them to the end point, which is investing. That's what technology is enabling us to do today.

**Q:** You've spent much time on both the marketing side and the investing side of finance. Can you share with our readers your professional background and how you came to be where you are today?

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**A:** Everything I have done has been right down the center of the fairway, but with a perspective that is completely different. After dropping out of both science and art schools, I ended up with clients working in the public markets who presented to brokers and analysts. While serving them food and drinks, I had the audacity to tell my client that they weren't telling a good story and they weren't visualizing data optimally. Eventually, they introduced me to the investment banking world and I began writing Initial Public Offering road shows. A few years into this I learned about the money management business, and took my storytelling and data visualization to help money managers win mandates and allocations. Fast forward, I had started a software company, my team was up to 80, and I sold it to a public company in the UK. Then, I became the Chief Marketing Officer for TheStreet.com and helped drive them to their first profitable year. I then worked in digital for the presidential campaign, where I was quickly disillusioned. I founded Clear Asset Management, where we built a multi-factor model that could beat the indices. I mastered portfolio and risk management and we had a winning combination. We were venture backed and seeded by a family office. Then, there was a new industry with ETFs, and Clear developed six of them and eventually, our first long/short hedge fund. I sold that business to a small bank and two years later spun out to E5A Investment Management. I raised about \$160 million in my global long/short from new clients in a few months. It was then that I got sucked back into marketing by being offered to analyze a large (\$40 million budget) data set and the creative for an online broker. Eventually, I needed to make the choice between the two worlds, and I chose marketing.

**Q:** What is E5A's mission?

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**A:** Our mission is to modernize the sales and marketing process by doing two things. The first is to get marketing a seat at the table. If you go to multi-family offices or hedge funds, most are sales driven. Good marketing helps them accelerate their asset gathering. We help funds and managers figure out the math. A typical hedge fund may want to bring on 30 new clients per year. When you actually do the math, you need to figure out just how many final presentations they can handle

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per year that would get them to that number. We help them keep the pipeline going and to make sure the lead generation is at the right pace so they can supply world class service and not waste time prospecting. Our take on prospecting, thought leadership, and the like is unique because we have serviced the same clients. We have managed money for the same clients, and we have been allocated by the same clients. We can explain investment process in a differentiating manner, and target the right investors, which makes us a new breed of marketing firm.

**Q:** How does your program go about engaging thousands of potential investors?

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**A:** If you have read the book *The Art of War*, there's an understanding that all battles are won or lost before they're fought. Understanding the math, creating a scoring system, understanding how many new clients you want, and bridging that data is how we begin that process. Next is to craft a truly differentiated message. We handle this through a full day workshop with each manager or multi-family office we work with, and bring them through a series of exercises to uncover the information out that we need. Even if we're working with a 30 year old firm, we may redo most of the messaging from scratch. It's not that they don't have good messaging, but we can help them make it clearer and more compelling to their precision audience. We want the prospect to have a reason to act. We break each touch-point into components to help prospects along the path to allocation.

**Q:** Can you define touch-point predictive analysis?

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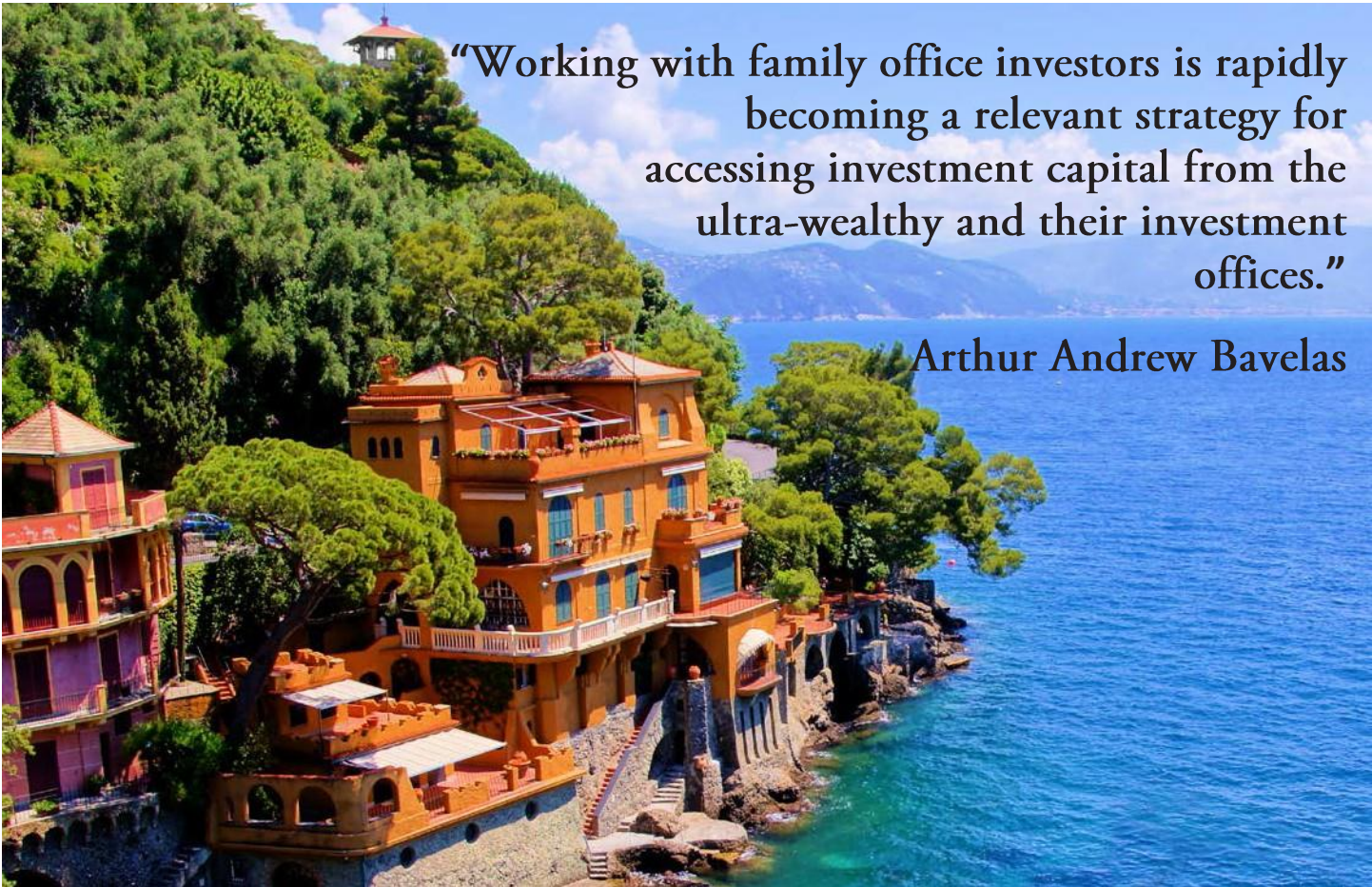
**A:** Predictive analytics looks at all touch-points and what it took to get the prospect through that continuum. We can optimize all the messaging based on that information. Generally, when we calculate a predictive budget after running a test, we almost always beat our prediction because of our ability to continuously optimize the messaging. The people who allocate teach us what is working and what isn't, because we've parsed the process into components that empowers our analytics to be predictive. Had I not developed a factor model and managed over \$2 billion at my peak, I would not be in the position to do the work we are doing now in both its depth and complexity.



**Andrew Corn**

*Andrew Corn, CEO, heads strategy consulting covering positioning, messaging, product development, predictive programs and distribution for E5A clients. His career has spanned client-side sales and marketing, Chief Investment Officer – Equities and ad agency head. For more information, please go to <http://e5saintegratedmarketing.com> or email Andrew at [acorn@E5AIM.com](mailto:acorn@E5AIM.com).*

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**“Working with family office investors is rapidly becoming a relevant strategy for accessing investment capital from the ultra-wealthy and their investment offices.”**

**Arthur Andrew Bavelas**