

A photograph of three business professionals in an office setting. A man in a white shirt and tie stands in the background, pointing at a tablet held by a woman in a dark blazer. An older man in a suit sits at a table in the foreground, looking at the tablet. The background shows a bright office with large windows.

QUALIFICATION : PROJECT 1016

Wealth Management | Advised Distribution (REITs)

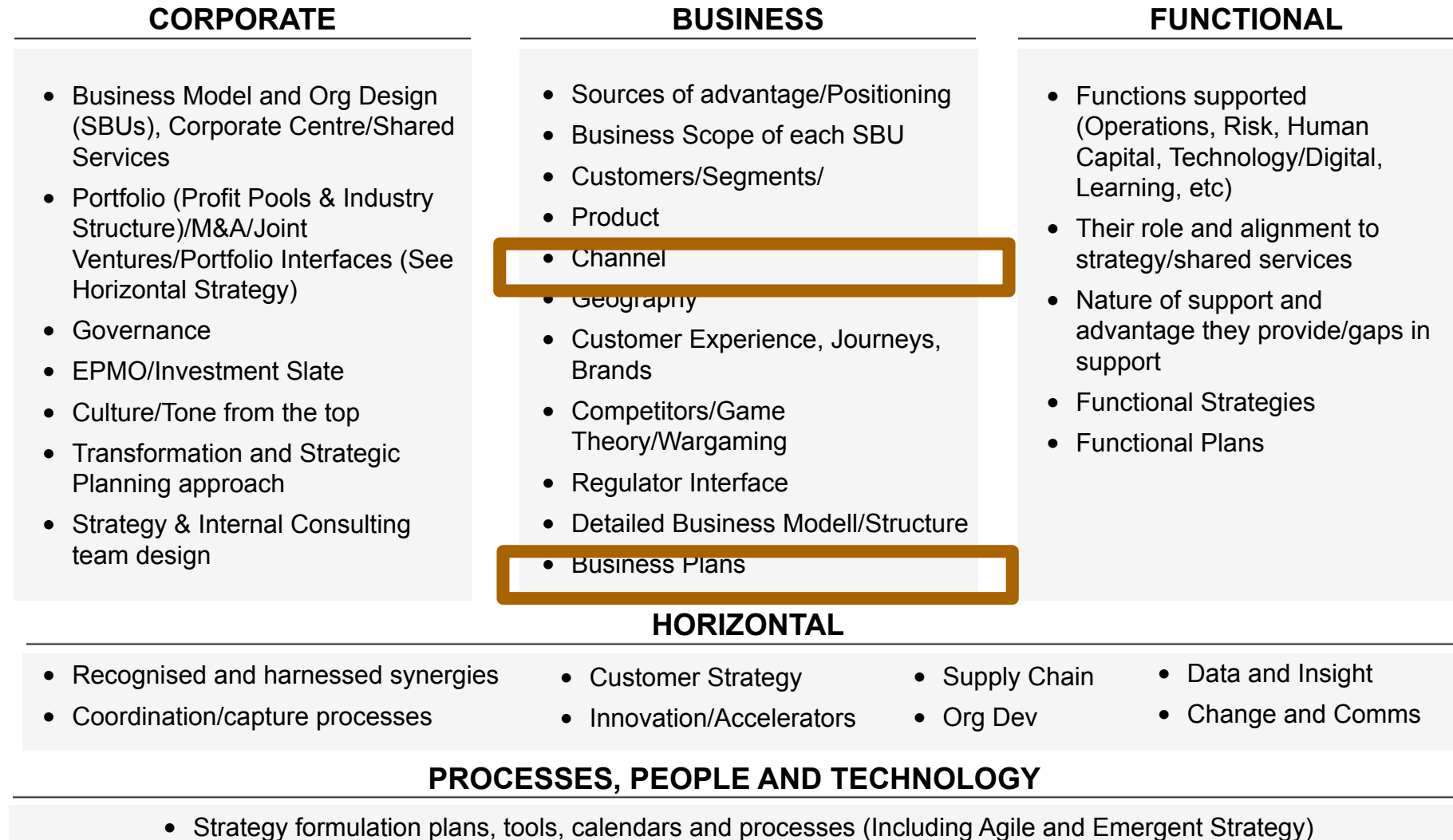
May 2024 – June 2024

QUALIFICATION PROJECT: KEY WORD SEARCH: Consulting Project, Strategy, Distribution Strategy, Advisor Channel, Real Estate Trust (REIT)

Summary: ICG developed a retail distribution strategy for a managed fund		Client					
Project description/approach	<ul style="list-style-type: none"> Determined route to market and areas of focus to optimise marketing and distribution effort Identified existing business, people, process and technology challenges and capability gaps Explored the emerging role of AI and other best practices to support the channel 	Industry	• Wealth Management				
Why ICG was needed	<ul style="list-style-type: none"> Client had an underperforming key product The Head of Distribution sought ICG's help in determining which levers to focus on to broaden distribution in retail sector 	Sector/Function	• Retail Distribution & Marketing				
Impact delivered by ICG	<ul style="list-style-type: none"> Injected market and industry knowledge and insight Quickly understood the current business, its performance, strengths, weaknesses, and opportunities Provided regular updates to business, delivering new insights Delivered a clear retail marketing & distribution strategy and action plan in a short, focused engagement. 	Geography	• Australian Real Estate Investment Trust				
Critical insights / new ICG IP available to new clients	<ul style="list-style-type: none"> Proven process for developing an adviser distribution strategy, delivering best practice perspectives across many aspects of intermediated distribution 	Project period/duration					
Client feedback "Would you use ICG again, and if differently, how?"	<ul style="list-style-type: none"> Yes; "This has been a great engagement. ICG delivered more than we expected of them and the team really knew the industry well" 	May 2024 – June 2024					
		ICG Contact Partner for more information					
		sam.boer@internalconsulting.com paul.horder@internalconsulting.com jacek.noga@internalconsulting.com					
		Project Scale	USD \$0-\$50K	USD \$50K-\$100K	USD \$100K-\$250K	USD \$250K-\$1M	USD \$1M Plus
		ICG contribution	X				
		Total scale		X			

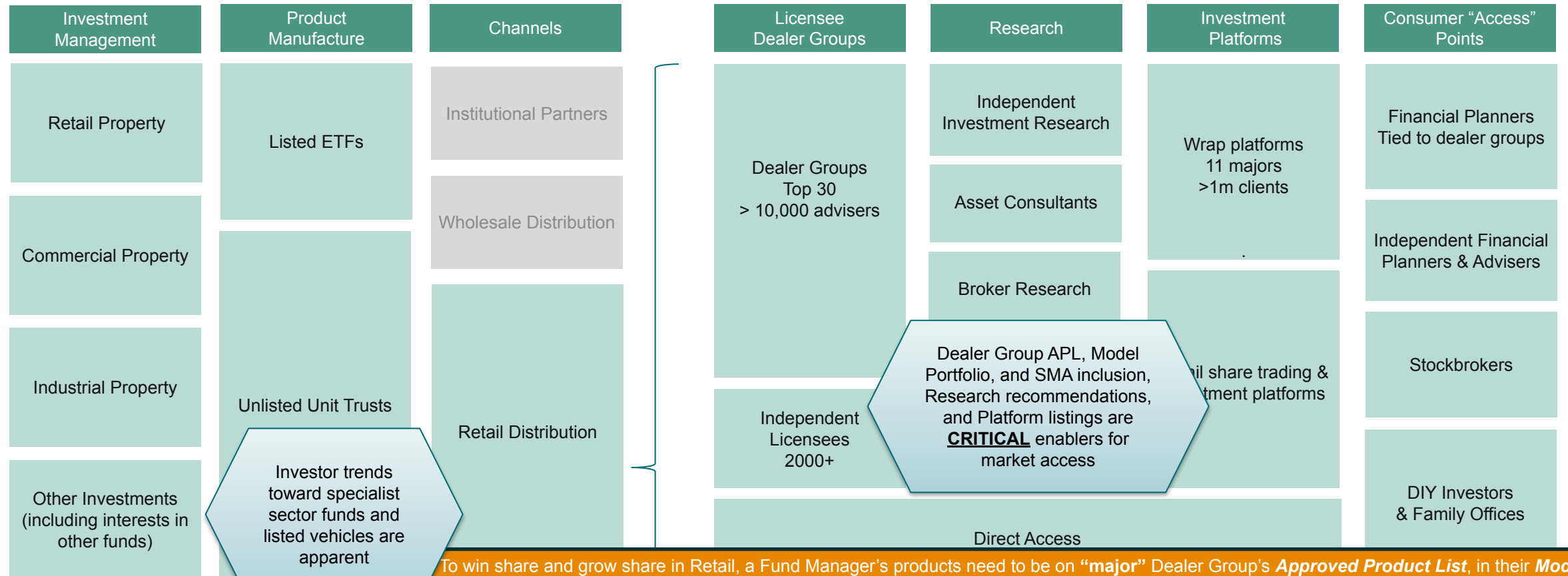
This project was focused on business strategy, specifically distribution

ICG's Strategy Taxonomy



ICG developed an industry value chain for the client, identified routes to market, key decision influencers, and required capabilities and activities for success.

We identified a route to market and areas where additional capability or activity was required to deliver the recommended strategy



To win share and grow share in Retail, a Fund Manager's products need to be on "major" Dealer Group's **Approved Product List**, in their **Model Portfolios and SMAs**, be on **Platforms** and be covered by **Research**. **Product** innovation will also be a key success factor to meet the needs of changing investor preferences **toward listed and specialised funds**. **Marketing & distribution will need to segment** the Adviser market to target high volume Practices that value our products over the competition, provide sector insights & research, education, training, and "always on" marketing to achieve cut through.

ICG developed a strategy and roadmap for growth, and detailed specific marketing and distribution initiatives to deliver required capabilities..

A roadmap was determined identifying critical levers by time horizon

Objective	Stream	Quick Wins <3mths	Short Term 3-6mth	Med term 6-12mth	Stage 2 & 3 (12months plus)
Expand APL & Platform Coverage	Platform & Dealer Group APL Coverage				
Uplift Operational Effectiveness	Retail Excellence				
	CRM & Segmentation				
	Sales & Marketing Operating Rhythm				
Uplift Marketing Effectiveness and Marketing ROI	Product Packaging & Marketing				
	Content, Comms and Messaging (incl. investor focus, asset story, tone)				
	Sponsorships & Events				
Embed Market Insights Feedback Loop	Industry, Competitor and Consumer Insights				

Specific initiatives were defined where additional capability or activity was required to deliver the strategy

Event type	Purpose	Cost	Effort	Benefits	Audience	Recommendations & considerations
Adviser Webinars						
Run Professional Development events / Roadshows or CEO "Dealer Group Sponsors" lunch						
Dealer Group Sponsorships – incl conferences and PD Days						
Industry Sponsorships – Conferences / Awards etc						
Adviser Recognition Program*						
Dealer Group Research Team / External Research Agencies / Stockbroking Analyst engagements						



Contact your Partner for more information

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