

Hedge Fund's need for tailored research to uncover advertising trends in the social media industry

A San Francisco-based Hedge Fund wanted to look more deeply into the drivers behind the revenue trends at a social media firm. They looked to Coleman to conduct research into the social media company's sales and marketing strategies.

THE CHALLENGE

The Need for Expert Knowledge

James is an investment analyst for a hedge fund based in San Francisco that manages over \$3 billion in assets. In this capacity, he is responsible for identifying investment opportunities, as well as conducting much of the due diligence and research. Because the firm holds stocks longer than other hedge funds, James spends considerable time researching his sector prior to making each investment decision.

The depth of market information James requires had been getting harder to uncover online or through sell-side research. In order to make informed investment decisions, he needed a fast and reliable source of information about industries and companies that are not well covered in secondary market research.

In his pursuit to uncover unique and timely information, James decided to partner with Coleman Research. Ali was designated as the Client Manager for James' firm, and worked directly with him to develop a complete understanding of his research process and requirements. This enabled her to provide tailored service addressing his specific research preferences and compliance requirements.

In a recent project, James needed to evaluate a social media company's advertising and marketing strategies, as well as broader advertising trends in that industry. A key data point for this project was understanding how to calculate Marketing ROI, which can be difficult to determine.

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There's no way I could understand the industry as well as those who have worked in it for years and years. Being connected to those people who can answer specific questions is imperative to my research process.

—James, Investment Analyst for a Hedge Fund

THE SOLUTION

Tailored Research and Relationship Management

James requires several experts for each project, and his firm maintains specific compliance criteria that must be upheld for every call. In order to meet these requirements, Ali and her team consistently deliver at least five relevant individuals that can help James understand industry dynamics and test his investment assumptions. Coleman also has an entire team dedicated to helping James and his firm manage compliance requirements

Ali connected James with seven qualified advertising experts working in the target industry. Her team took care to qualify each expert over the phone to verify their relevance and qualifications, and to make sure they meet James' compliance requirements.

Coleman's Scheduling team then quickly arranged 1-on-1 Consultations from which James acquired the knowledge and insights necessary to understand the social media company's strategy and effectiveness as a marketing channel. Based on these consultation calls, James confidently moved forward with his investment.

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Coleman's Client Managers understand our clients' needs on a higher level than simple customer service. We make a point to proactively reach out to help clients with new projects. This ensures that their research runs as seamlessly as possible.

—Ali, Coleman Client Manager

THE RESULTS

Unprecedented Access to a Global Network of Experts

By partnering with Coleman, James has gained even greater confidence in his investment decisions. He quickly realized the value Coleman brought to his process, not only in the breadth of their network but in their engagement and fulfillment processes as well.

At Coleman, our proactive and well-trained teams of client managers, researchers, recruiters, compliance officers and schedulers work together to connect James with industry leaders who can provide him with current market information.

In addition to arranging expert consultations, Coleman offers a full suite of services to help James remain informed about emerging trends in his target industries. Coleman helps James stay informed about the most important market-moving activity, with regular conference calls across all verticals, and tracking services that follow industry trends over time and alert him to major shifts.

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Coleman's team helps me find experts who are intimately familiar with all of the different industries and companies that I research.

—James, Investment Analyst for a Hedge Fund