

CASESTUDY

LEVERAGING VALUE TO ACCELERATE A SUCCESSFUL FINANCIAL SERVICE LAUNCH



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As we launched our new fund, we had to create compelling storytelling, explaining our differentiating value to new prospects. Leveraging Genius Drive's messaging expertise and services, we codified our customer's challenges and built compelling infographics, presentations and more to prove the value of our new solution, improve customer engagement and grow our business at record levels.

– **NEIL MENARD**,
PARTNER, PRESIDENT OF GLOBAL DISTRIBUTION CONVERSUS (A STEPSTONE COMPANY)

EXECUTIVE SUMMARY

This case study analyzes the accelerated launch success of investment firm CONVERSUS (now Stepstone Private Wealth) as they leveraged a more value-centric approach to accelerate growth in assets under management, from zero to over \$1B in record time.

CHALLENGE

Conversus was launching their company and first product, providing private equity investments

previously available only to large institutional investors, to now make these portfolio assets available to a broader investment audience, including high net worth individuals and smaller institutional investors.

The team needed to convince this new audience on the advantages of private equity investments as part of a solid portfolio. The team recognized that taking a more traditional product-led or technical approach would not yield the growth results needed.



Company: Conversus (Now branded as Stepstone Private Wealth)



Industry: Financial Services / Financial Technology.



Business Model: Conversus is an investment firm that helps convert the private market advantages enjoyed by large institutional investors into opportunities for high net worth and small institutional investors.

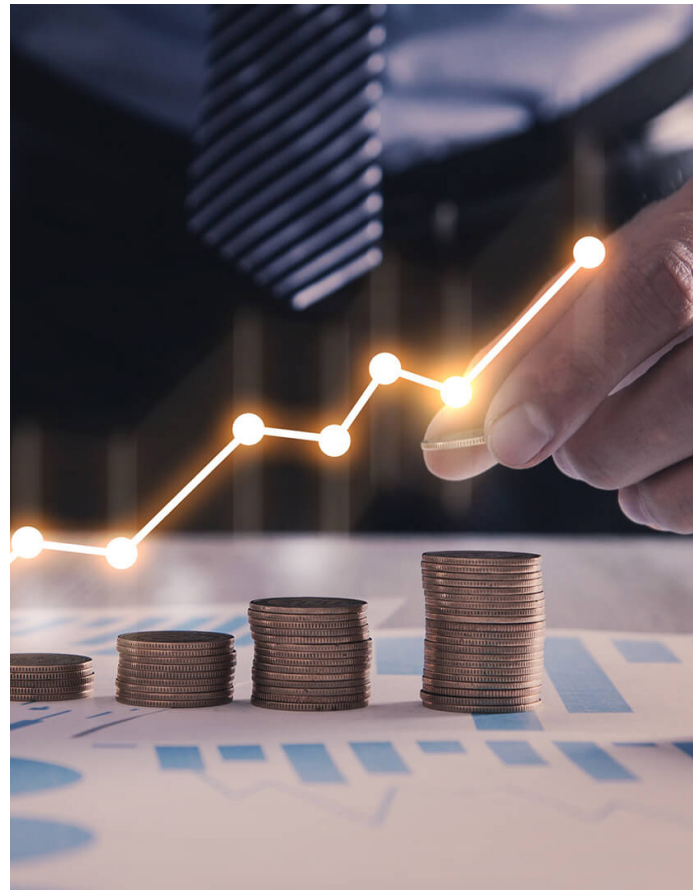
<https://www.stepstonegroup.com/>

IMPLEMENTATION PROCESS

Genius Drive was engaged to develop the initial company and product go-to-market positioning.

Genius Drive worked with the executive team to:

- ✓ Develop initial value messaging and storytelling using the new PIVOT method.
- ✓ Create the initial client presentations and infographics to help in marketing outreach and especially for sellers to engage with prospects.
- ✓ Guide the use of the storytelling content in social outreach and other launch campaigns.



RESULTS AND BENEFITS

Genius Drive helped Conversus to pivot from selling the features of the company and investment vehicle, to articulating the business value of the solution as part of smarter portfolio and asset management strategies.

As a result, Executives and sellers were enabled to articulate the differentiating value of the investment to new prospects, dramatically accelerating company growth to over **\$1B** in record time.

This success also led to Conversus, originally an independent Stepstone company, to be acquired as a fully integrated Stepstone entity, rebranded as Stepstone Private Wealth.

DETERMINE FOR YOURSELF HOW A VALUE-CENTRIC APPROACH CAN REVOLUTIONIZE YOUR BUSINESS STRATEGIES AND OUTCOMES.

CONTACT@GENIUSDRIVE.COM

