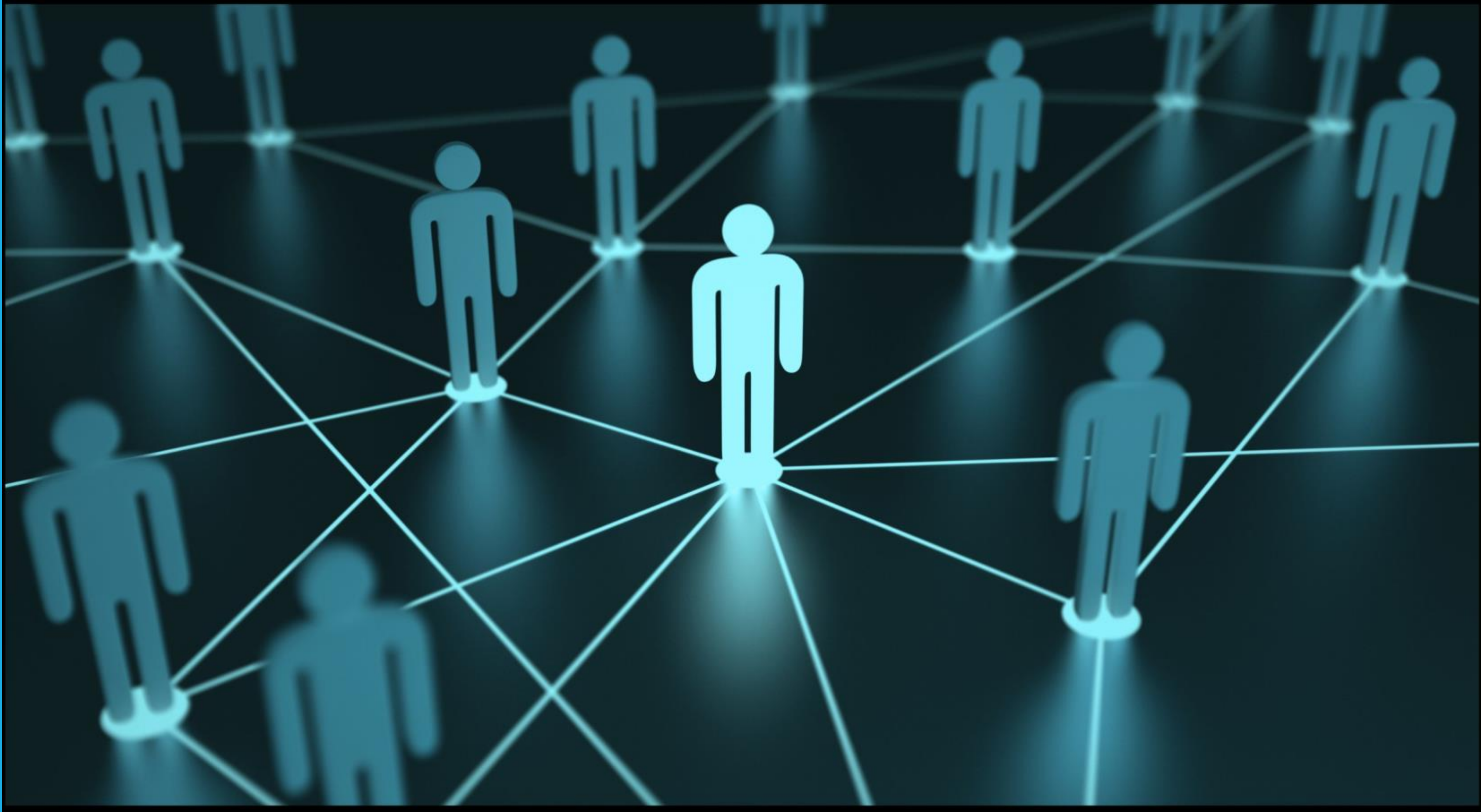
joe worden marketing

TRUST-SEQUENCED FUND MARKETING

The Marketing Process
2. Creating Archetypes

Defining and Detailing Your Ideal Investors and their Behaviors



--A Strategic Marketing Resource by Joe Worden | More @ www.jrworden.com

Creating Investor Archetypes – Beyond Demographics to Decision Psychology

From Generic Targeting to Precision Engagement

In our nine-process Trust-Sequenced system, Research & Discovery clarifies the playing field; Investor Archetypes clarify who is on it and how they decide. Process 2 turns faceless "allocators" into defined behavioral profiles that every subsequent decision is built on.

Some managers—we'll call them Group 1—have worked with the same investors for years. They know exactly what those investors want and how and when to reach them.

Group 2 recognizes the value of segmentation and targets investors by firm type—family offices, RIAs, funds of funds, alternative gatekeepers, and so on.

Group 3 takes it further, breaking down those segments by targeting specific decision-makers using firmographics and demographics such as AUM, location, employee count, and investment history.

And then there's Group 4—still clinging to one-size-fits-all marketing and blasting generic messaging at anyone who can fog a mirror.

If you're in Group 1, stop reading. You've earned the day off—go plan your next vacation. But if you're in Groups 2, 3, or 4, keep reading. The remainder of this content will give you a marketing edge that moves you closer to vacationing with Group 1.

Today's investors are digitally savvy and expect more from anyone presenting new opportunities. They're not persuaded by surface-level marketing and boilerplate communication. They expect personal engagement and tailored resources that guide them toward solutions to portfolio problems, performance objectives, and long-term goals.

To deliver that, you need more than broad strokes. You need to know not only what they want, but also how, when, and where to engage them. You need archetypes that go beyond demographics. You need insights deep enough to earn their confidence and build their trust.

That requires understanding the details: not just who your investors are, but how they think, decide, and act. This is the 100- to 200-level foundation for building behavioral archetypes—profiles that capture psychological drivers, biases, and allocation patterns that shape investment decisions. With this clarity, your messaging becomes personal and relevant, your sequencing becomes strategic, and your engagement becomes trust-building instead of transactional.

Every engagement we run includes this work. We do not design campaigns, collateral, or outreach sequences until these archetypes are defined.

The Archetype Problem

- **Demographics Masquerading as Insight:** *Too many managers stop at labeling investors by type or size, assuming that's enough to craft a message. It isn't.*
- **One-Size-Fits-All Messaging:** *By treating investors as interchangeable, managers deliver communications that feel irrelevant or tone-deaf.*
- **Ignoring Decision Journeys:** *Most outreach strategies don't account for how investors move from awareness to commitment, or who influences the decision along the way.*
- **Misaligned Timing:** *Reaching out before trust is built or after interest has faded creates wasted effort and missed opportunities.*

This is where trust collapses—because relevance is the first requirement of credibility.

Our Behavioral Archetype Framework

We build archetypes using four dimensions of investor clarity. Together, they give us—and you—a practical, decision-ready view of who you're speaking to and how to earn their trust.

1. Behavioral Profile Development

- Map the psychological drivers behind allocation decisions.
- Identify risk-tolerance patterns, decision biases, information-processing styles, and trust triggers.
- Gain insight into each investor's likely Big Five profile (openness, conscientiousness, extraversion, agreeableness, neuroticism). This allows us to anticipate how different personality types process risk, respond to authority, and approach decision-making.
- Translate those tendencies into expected biases, heuristics, and emotional triggers that either accelerate or block engagement.

How we use it:

These profiles shape tone, proof selection, and risk framing. A loss-averse, highly conscientious allocator sees a very different early-sequence message than an optimistic, high-openness family office principal—even if both sit in the same "segment."

2. Decision Journey Mapping

- Chart how investors move from initial awareness to actual commitment.
- Define key evaluation stages, internal approvals, and decision criteria.
- Identify what information is required at each stage to keep momentum alive.

How we use it:

This directly informs what we send and when. Early touches lean on context and fit; mid-journey pieces support due diligence and internal memos; late-stage interactions reduce friction with clear next steps and risk framing. These maps become the backbone for later processes—framework, experience, and execution.

3. Communication Preferences

- Determine where investors consume information, in what formats, and through which channels.
- Identify their trusted sources, peer networks, and preferred communication styles.
- Distinguish between the content that resonates and the content that triggers resistance.

How we use it:
Channel and content planning stop being guesswork. If a particular archetype leans heavily on peer references, long-form memos, and conference follow-ups, we design your sequences accordingly. If another archetype prefers concise briefs and analyst-level deep dives, we adapt the cadence and formats to fit.

4. Adoption Behavior Classification

- Apply Rogers' innovation adoption theory to investor behavior.
- Classify investors into:
    - Fund Anchors – Early strategic adopters who establish credibility.
    - Investment Influencers – Validators who provide critical social proof.
    - Early Mainstream – Investors who follow once credibility is established.
    - Late Mainstream – Consensus followers who adopt only after widespread validation.
    - “Come-Back-When” / Top-Off Investors – Allocators who rarely lead but will participate later to top off exposure once the strategy is proven and well-referenced.

How we use it:
We sequence early credibility-building around Fund Anchors and Influencers, then open the door for Early and Late Mainstream once trust signals—returns, references, case studies—are visible. “Come-Back-When” / Top-Off investors are nurtured with low-friction updates rather than chased, so your team spends time where momentum is possible.

Our Specific Deliverables

For each archetype, we develop:

- Detailed profiles with psychological insights and behavioral tendencies.
- Decision-journey maps showing progression from awareness to commitment.

- Channel-preference analysis identifying optimal communication strategies.
- Adoption-curve positioning to inform timing and sequencing.
- Trust-trigger identification unique to each archetype.

These outputs feed directly into your messaging, content roadmap, outreach sequences, and CRM structure.

Strategic Advantages of the Approach

- **Message Relevance** – Speak to motivations that move capital, not assumptions.
- **Channel Precision** – Focus resources on where your investors engage, not where they don't.
- **Timing Optimization** – Reach investors when they're most open to new opportunities and internally able to act.
- **Authentic Personalization** – Tailor communications in ways that feel genuine, not manufactured.
- **Trust-Building Strategies** – Design engagements that work with investor psychology instead of against it.

In practice, this means your outreach stops sounding like “another manager looking for capital” and starts sounding like “someone who understands how we work and what we’re solving for.”

The Behavioral Finance Edge

A pension committee member with high loss aversion doesn't process information the same way as an entrepreneurial family office principal with optimism bias. Treat them the same, and you lose both.

By combining demographic context with behavioral insights—including likely personality profiles and cognitive biases—we can anticipate how different investors approach decisions and craft communications that feel personally relevant and trustworthy.

This is where the Trust-Sequenced philosophy becomes tangible: who we’re speaking to, what they need to hear at each stage, and how their biases and decision structures shape the sequence.

How We Maintain and Use Archetypes

- **Avoid Over-Segmentation** – Too many archetypes create noise; we focus on the few that matter most to your mandate and strategy.
- **Keep Them Dynamic** – Investor behaviors evolve with markets; we revisit and update archetypes as we see engagement patterns shift.

- **Tie to Data** – Archetypes gain strength when validated by engagement analytics—opens, clicks, meeting conversions, and capital movement.
- **Integrate Across Teams –** We design archetypes to inform marketing, sales, and investor relations so everyone works from the same picture of "who we're talking to."

This isn't a static exercise or a slide in a deck; it's a living asset we use across your campaigns and raises.

How and Why This Can Help You

Generic targeting leads to generic engagement. With these archetypes, you turn guessing into knowing:

- Who your investors are at a psychological level.
- How they process information and move through decisions.
- When and where they are most likely to engage—and with what kind of proof.

This shifts you from broadcasting messages that might stick to delivering communications that feel timely, personal, and relevant. It transforms marketing from a numbers game into a trust-building sequence.

Archetypes, paired with Research & Discovery, become the foundation for every subsequent marketing decision—framework, messaging, journey design, outreach, and measurement. Every step of Trust-Sequenced Marketing is built for specific investors, not an abstract "market," which is where durable relationships and repeatable capital formation start.