



**Top 10 List: Winning the Finals  
in Today's Environment**  
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**Andrew Klausner, CIMA, CIS**

The following are key points that you should address in your presentation – be forthright – if the client has to ask about these issues it is probably too late!

**Number 10:** Explain reductions in AUM. Differentiate between market losses and client terminations, withdrawals and redemptions.

**Number 9:** Describe any process changes that you have made in reaction to the events of the past year. Are these changes permanent or temporary? How have you and how will you deal with cash moving forward?

**Number 8:** Explain how you are retaining key talent.

**Number 7:** Highlight your operational capabilities and any changes that you have made to them over the past 12 months (personnel, procedures, etc.).

**Number 6:** Explain how you are adapting to the uncertain and changing regulatory environment.

**Number 5:** Detail your **Rebound Plan**.

**Number 4:** Tailor your presentation to the unique characteristics and concerns of the client – do your research upfront.

**Number 3:** Highlight your **Value Proposition/Mission Statement**. All things being equal, why should your firm be hired?

**Number 2:** Describe your overall business philosophy and how it has adapted – talk about profitability, resource prioritization, distribution, etc.

**Number 1:** TRANSPARENCY, TRANSPARENCY, TRANSPARENCY