



## WHO WE ARE

# Spencer Business Strategies

*Strategic advisory for WealthTech and wealth management leaders*

An operator-led advisory firm that helps WealthTech firms connect a strong product to the advisors who buy it and the investors they serve. Two decades in fintech SaaS, applied to one question: where is your client in your strategy?

## WHERE FIRMS COME TO US

|               |                                                                      |
|---------------|----------------------------------------------------------------------|
| Launching     | The product is real; the story and the pipeline are not yet.         |
| Entering      | Proven in financial services or technology, new to how advisors buy. |
| Repositioning | Established in WealthTech, but the market has moved.                 |

## FURTHER READING

[Our Resources: perspectives on putting the client at the center of WealthTech growth](#) →

*Visualize . . . Strategize . . . Realize*

## SBS AT A GLANCE | FOR WEALTHTECH FIRMS

# Your clients don't buy products. They buy **solutions to their problems.**

When a strong product struggles to gain traction, the gap is rarely the technology. It is the distance between what a firm builds, says and sells, and what its market needs. We call this **Strategic Drift**. Closing it starts with the client, and the client's client.

## HOW WE WORK



### VISUALIZE

#### See the client and beyond

Research into your buyer and the investor across their desk, and how they evaluate technology.



### STRATEGIZE

#### Align to the problem

Positioning, value proposition and a Client Empathy Matrix message map, so Product, Marketing and Sales tell one story.



### REALIZE

#### Take it to market

Targeted outreach, partnerships and sales support that place the story in front of the right buyers, through the right doors.

## WHAT CHANGES FOR OUR CLIENTS

- ✓ **Clarity.** A precise view of where the market loses the thread, and what to address first.
- ✓ **Buyer recognition.** Demos and collateral built around the advisor's problem, not the feature list.
- ✓ **One story.** A single narrative that Product, Marketing and Sales carry the same way.
- ✓ **Access.** An informed path to buyers through established WealthTech and RIA networks.

**86% vs. 40%**

### THE KIND OF INSIGHT WE UNCOVER

86% of investors want a full view of their wealth; only 40% believe their advisor has one. A message that speaks to both is bought twice. Source: Advisor360° Connected Wealth Report: Client Edition, 2024

## ENGAGEMENT OPTIONS

### Hourly

**\$350** / hour

Project-based support for defined deliverables.

### Retainer

from **\$3,500** / month

Ongoing advisory for continuous work.

### Fractional leadership

scoped to role

Part-time CRO, Head of Sales or Head of Business Development.

Most engagements begin with a **Market Clarity Diagnostic**, a fixed-fee review of your message, deck and demo.

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