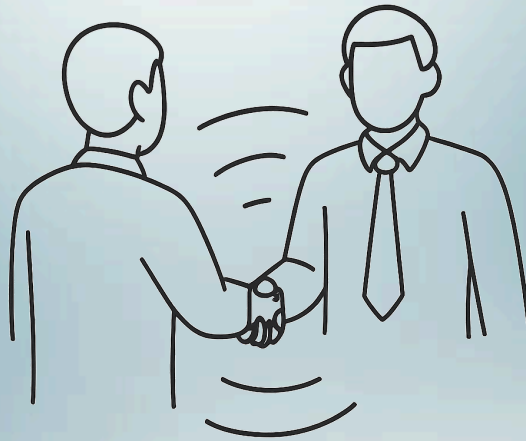


The Rules of Attraction

WHY YOUR TECH STACK ISN'T MAKING YOU
SEXY



We're living in the golden age of sales enablement. Today's client-facing professionals are equipped with a dizzying array of tools designed to turn outreach into a science: who to email, when to follow up and many meticulously timed "touchpoints" are necessary to secure a polite, but often noncommittal response

Firms are leveraging platforms like Seismic to automate content, Smartlead to orchestrate entire outreach sequences, and DocSend to monitor how long someone lingers on a PDF. While these signals can be informative, they often serve as vanity metrics masquerading as insights. This robotic and overly-structured outreach has become, frankly, tiresome.

We've all been on the receiving end of a "just checking in again!" email. The digital equivalent of a child repeatedly asking 'Are we there yet?' on a long drive. Client-facing work shouldn't be about proving you're there; it's about making your presence felt when it truly matters.

This is especially pertinent when your prospects aren't impulse-shopping on Instagram, they're managing billions in capital, underwriting risk and vetting deals that take months, or even years, to close. Trust is hard-earned, time is scarce, and the sheer desperation of sending another unsolicited calendar invite can feel, well, embarrassing and certainly comes across as offputting. These individuals don't respond to pressure; they respond to poise.

The best in the business, the leaders in capital formation, institutional sales, or big-ticket real estate aren't the ones who follow a rigid follow-up schedule. They aren't pushy or scripted, yet they always get a call back. Not because they adhere to a playbook, but because they never seem to need one. Their magnetism lies not in the volume of outreach, but in its selective application. They know when to advance and, crucially, when to recede.

Ironically, this restraint is precisely what enablement platforms are attempting to eliminate. You can book the third follow-up call to show your manager that you're working on the pipeline, but where's the long term payoff?

Supporting the view that rigid automation may overlook the nuanced needs of high-value clients, Gartner highlights a significant evolution in sales strategies, noting that "Driving change across the sales function requires the ability to refine messaging, streamline processes and find other ways to reduce seller drag. With seller burnout at an all-time high, an enablement focus on improving seller experiences can have a substantial impact on reducing regrettable attrition."

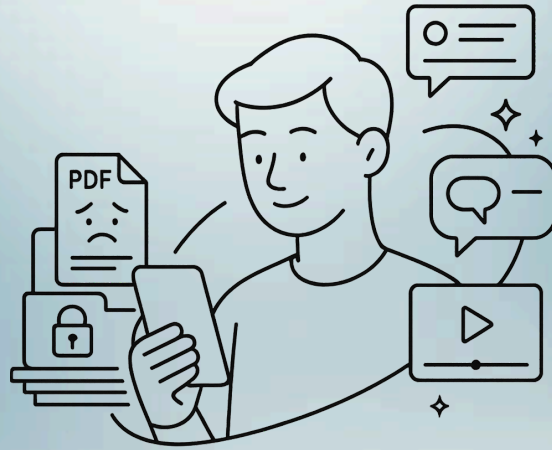
While everyone else is chasing their tails, the advantage belongs to those who can pull people in. Now that technology has made everything so accessible, there's value in being just out of reach. Algorithms may know the optimal time to send an email, but they'll never tell you when it's more powerful to not send one at all.

TechTarget discusses the balance between AI-driven outreach and automated sends, versus personalization and restraint, noting that while AI can personalize approaches at scale, it should not overshadow the importance of making each prospect feel valued and understood. They emphasize that personalization isn't merely about using someone's name; it's about demonstrating a deep understanding of each prospect's needs and industry challenges.

At the end of the day, a deal isn't just made on the attractiveness of a product, it's also made on the attractiveness of the relationship that comes with buying it. Few things are as alluring as the quiet confidence of someone who appears to not need your business.

Consider the Viewer

D O N ' T M A K E Y O U R M A T E R I A L P A I N F U L



Let's begin with the obvious: your clients are not flipping through investor decks in mahogany-paneled boardrooms. They're not dutifully logging into legacy portals, reading 30-page PDFs with a glass of wine and a yellow highlighter.

They're on their phones. They're on LinkedIn. They're in back-to-back meetings and opening your update between a Slack ping and a WhatsApp message. In short: your content is competing with everything else on their screen. And it's losing.

But it's not your fault—not entirely. You were told that "client engagement" meant putting a bunch of documents behind a login. That if you made things secure enough, organized enough, it would qualify as "value." That a portal, no matter how clunky, was a gesture toward professionalism.

It isn't. Not anymore.

The Great Misunderstanding

We forget, too easily, that your clients are viewers now. They swipe. They skim. They forward. They expect what they engage with to perform—visually, functionally, intuitively.

That means your PDF deck isn't just being read (if it's read at all). It's being judged—on design, on clarity, on whether it loads without friction. And your portal? It's being judged against Netflix, Instagram, and YouTube. Not fair, maybe. But absolutely true.

What we call "investor communications" has become a kind of unintentional satire: designed for compliance, not comprehension; built to protect information, not deliver it.

But They Logged In!

Did they? Really? Or did they try, fail to reset a password, and give up somewhere around "Your token has expired"?

The problem with most portals is not just that they're ugly. It's that they assume the viewer has infinite time and a deep desire to excavate information. They don't. They never did. But now, they have other options—other feeds, other platforms, other firms. The passive consumer is dead. The client is active, visual, impatient.

Modern Delivery is Modern Respect

The next generation of client platforms won't look like portals. They'll look like media: modular, fast-loading, mobile-first. Think dashboards, not folders. Think video updates, not email attachments. Think trackable insights, not polite check-ins.

And the firms that understand this shift—the ones that respect the viewer as much as the message—will build actual engagement, not just access.

So: Consider the Viewer

Not just what they want to see, but how they want to see it. Not just what you say, but what it feels like to receive it.

Because in a world where time is attention and attention is power, the most valuable thing you can give your clients isn't another PDF. It's an experience worth staying for.

The Goldman Standard

HOW GOLDMAN SACHS MASTERED TEAM ALIGNMENT
TO SCALE SALES



Goldman Sachs has long set the benchmark for how a firm can effectively scale sales across both institutional and retail markets. At the heart of their strategy is a sophisticated, highly integrated approach to aligning product development with sales execution. By ensuring tight coordination between these teams, eliminating data silos, and continuously refining its client engagement model, Goldman has built a sales machine that serves everyone from pension funds to high-net worth individuals.

Goldman Sachs doesn't view sales and product development as separate silos—it treats them as interdependent. Product managers and engineers work alongside sales professionals to develop solutions based on direct client feedback and market demand.

This feedback loop is particularly evident in their digital platforms like Marquee, which offers institutional clients direct access to trading tools, analytics, and research. According to Goldman, "Marquee is a client-facing platform that brings together our intellectual capital, trading functionality, and data into a unified interface" (Goldman Sachs, 2023).

By embedding product innovation within the sales cycle, Goldman empowers its sales teams with tools that are both customizable and client-informed.

Success in Structured Products

One of the clearest examples of Goldman's integrated sales model is its approach to structured products—custom investment vehicles tailored to meet specific risk/return profiles. These are not off-the-shelf products; they require deep collaboration between structurers, risk managers, and sales professionals.

Goldman's structured products desk leverages real-time analytics and scenario testing to present options to

clients in a consultative format. Clients don't just receive a pitch—they receive a solution that feels engineered just for them. According to the Financial Times, this high degree of personalization is what sets Goldman apart: "The bank's ability to co-design structured notes with clients in real time is a key differentiator in the competitive private wealth market" (FT, 2022).

Building for Repeat Clients

The firm's success isn't just in closing deals—it's in repeat business. Goldman's client lifecycle model emphasizes ongoing education, post-sale support, and relationship management.

For example, Goldman's private wealth management team often hosts tailored content events and portfolio reviews, ensuring that clients view the firm as a long term partner rather than a product vendor.

As explained by McKinsey, "Firms that invest in cross functional sales and product collaboration see up to 25% faster revenue growth and significantly higher client retention" (McKinsey, 2021). Goldman's model reflects this philosophy at scale.

Goldman Sachs has proven that even in a digital age, the most effective sales models are those rooted in alignment, precision, and long-term partnership. By tightly integrating sales and product development teams, eliminating data silos, and using technology to personalize at scale, Goldman offers a blueprint that every financial firm—retail or institutional—should study.

Whether selling complex structured products or managing everyday client relationships, the Goldman model demonstrates that sales success starts with understanding, and ends with trust.