



DEMAND GENERATION

102 institutional introductions, with the name intact.

Family offices, credit funds, SBICs, regional banks and credit unions are among the least tolerant buyers in the market of being approached badly. One careless message undoes years of goodwill. That constraint is the engagement.

Client A corporate finance group

102

New institutional introductions

6

Categories of counterparty in scope

0

Incidents affecting the client's name

THE SITUATION

The mandate was not more deals. It was more institutions to do deals with.

The client is a corporate finance group. It did not engage us to find deal principals, which is work it already does well. It engaged us to widen the set of institutions it could transact with: the counterparties on the other side of a transaction, whose appetite decides what can actually be executed and how quickly.

The target list was specific, and it was difficult. Single and multi family offices, limited partners, credit funds, SBICs, regional banks and credit unions. Conservative, referral-bound and reputation-first, and the accurate data on them is expensive where it exists at all.

That produced the constraint the engagement turned on. Interest had to be created without cheapening the name. The rule we set was plain: generate interest, and never spend reputation to get it.

So the work started with the client rather than with a list. We sat with the team and extracted how the firm actually evaluates a counterparty, which mandates it funds, how these conversations normally begin, what language earns trust in this market, and the lines that are never crossed. That diligence is what lets us operate in an industry where the client has decades of standing and we have none, and it is why the client could green-light the positioning rather than take it on faith.

WHAT WE DID

- Extracted how the firm evaluates a counterparty, and what it will and will not fund
- Documented the language that earns trust here, and the lines that are never crossed
- Verified where these institutions actually are before choosing a single channel
- Put every message and every target through the client's green light before it went out
- Executed through private infrastructure built for controlled messaging at scale

WHAT MADE IT WORK

Interest, without spending reputation to get it.

In this market a message that lands badly is not ignored. It is remembered, and it is repeated. The constraint was never reach. It was reaching without cost to the name.

Audit first

The diagnosis comes before any proposal.

Fixed scope

Written and bounded. No open ended retainer.

Senior operators

The people who scope it are the people who do it.

One name owns it

A single lead is accountable for the number.