Omri D. Ben-Amos

ASSET MANAGEMENT MARKETING PORTFOLIO

FEBRUARY 2023

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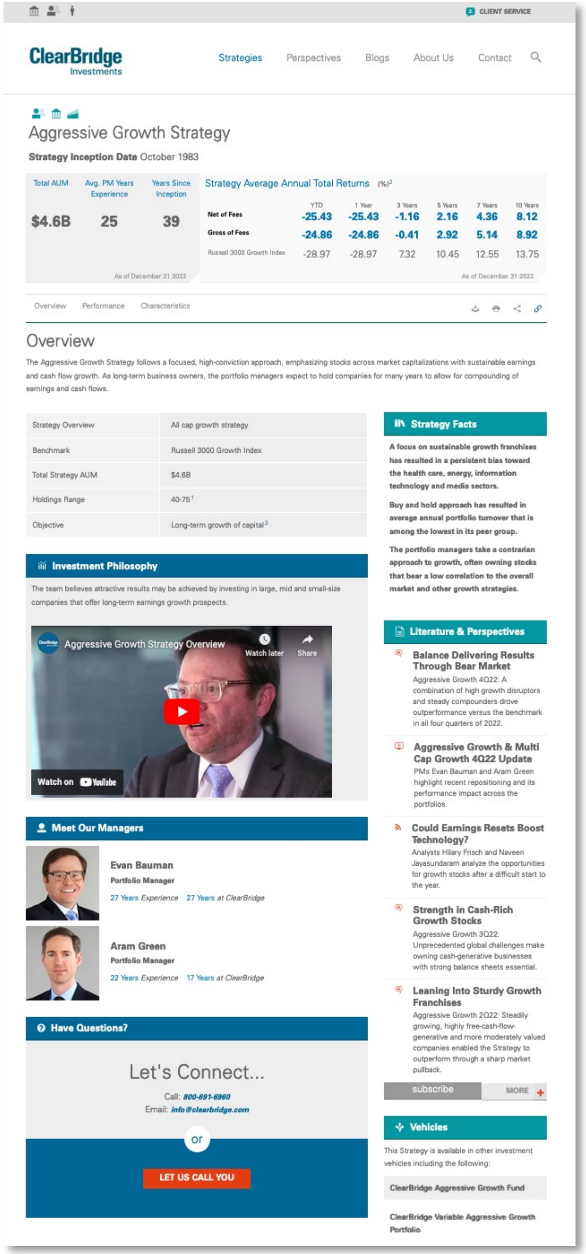
Commentaries

- Wrote or edited quarterly and monthly Product Commentaries for Mutual Funds, Separately Managed Accounts, ETFs, UCITs, and Variable Annuities, produced in collaboration with Portfolio Managers for Public, Third-Party, Institutional or Client Service use
- Produced high volumes of accurate and insightful commentary on tight deadlines
- Coordinated compliance reviews, PM approvals, and recordkeeping
- Developed processes and cross-functional programs to plan and manage workflows, deliver necessary data, track production, and improve efficiency
- Introduced the use of Natural Language Generation software (AI) to convert attribution data into text

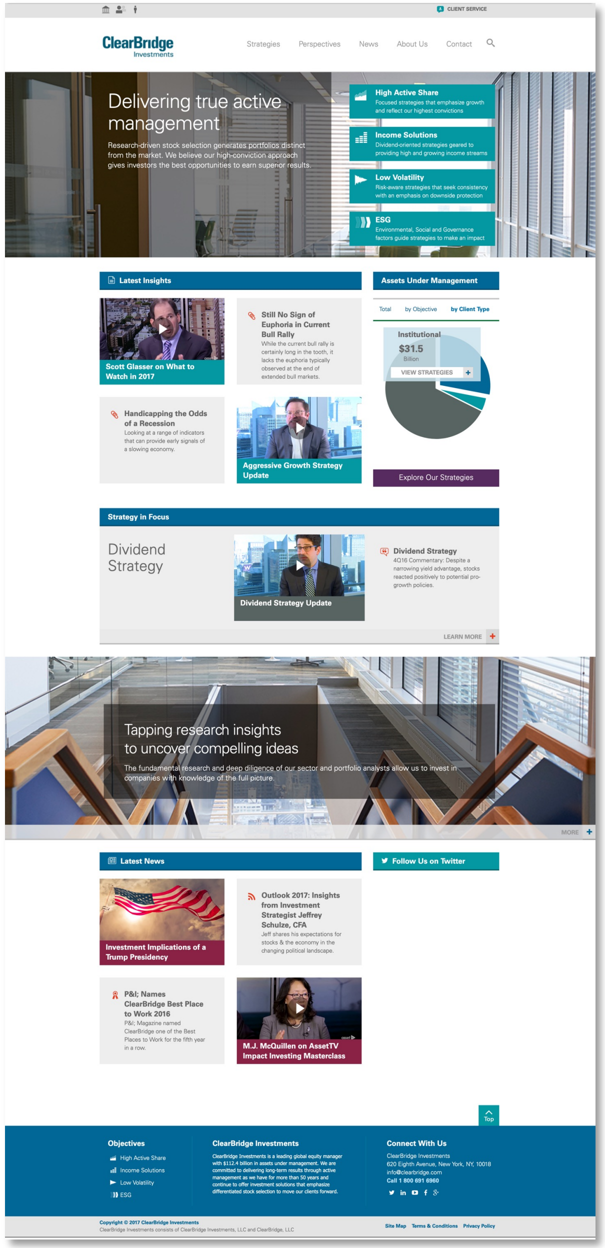
Core Product Collateral

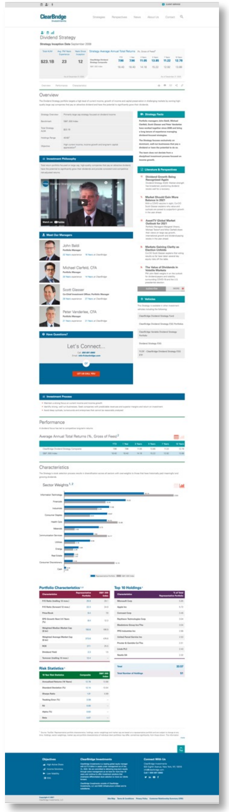
- ClearBridge.com website
  - Product Web Pages
  - Overview Videos
- Product Brochures
- Fund and SMA Fact Sheets
- Institutional and Retail Pitchbooks
- Shareholder Communications

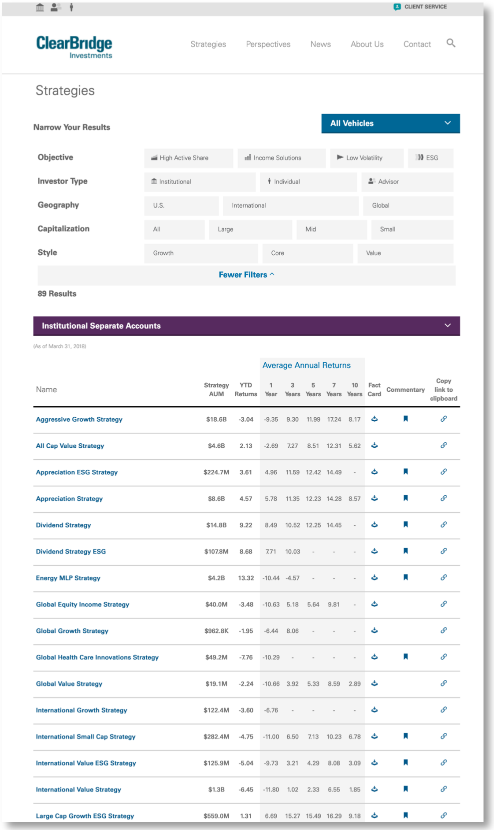


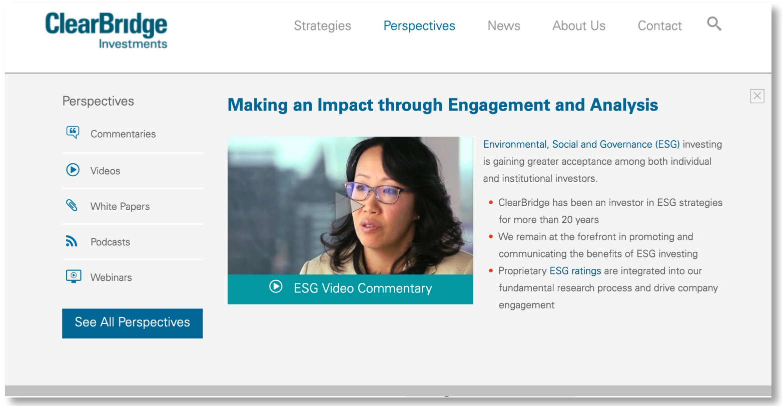
Website & Digital Marketing

- Led the digital transformation of the institutional marketing program, centered on the comprehensive redevelopment of clearbridge.com
- Working with internal stakeholders and external vendors, I coordinated a global cross-functional team that transformed a static web 1.0 site into a dynamic and responsive digital marketing hub
- I partnered with sales to define distinct client personas and customize the user experience (UX) journeys for the institutional, advisor, and retail audiences
- I introduced automated lead scoring to funnel marketing-qualified leads into our CRM
- Using AEM to automate fact card updates, I cut 7+ BDs from the quarterly production process for 30+ institutional strategies representing over $100B in AUM
- Owned site content, analytics, and daily operations
- Managed $2M+ project development budget and vendor relationships
- Managed outbound email and subscriber lists



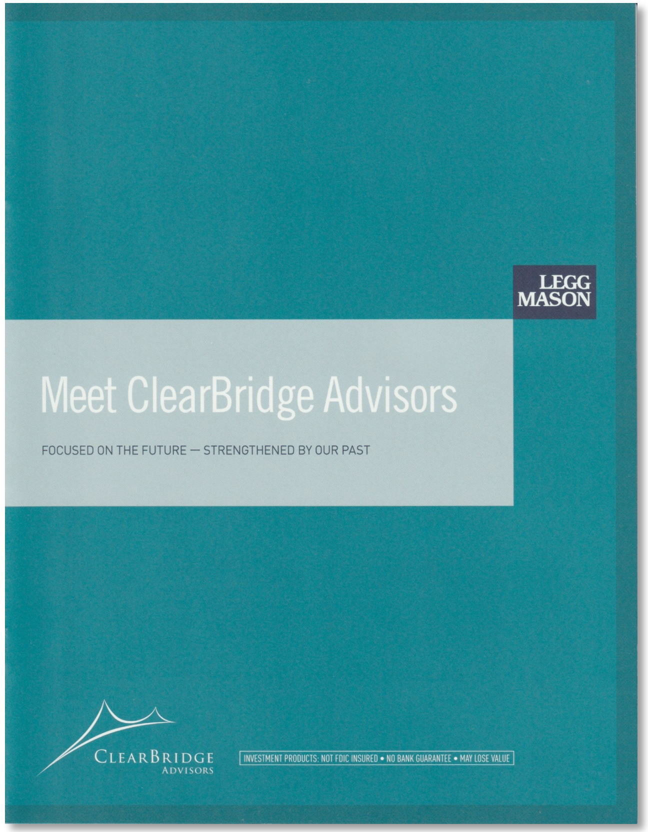


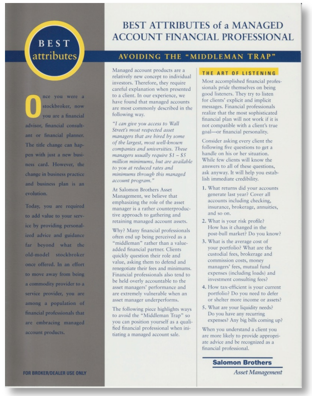


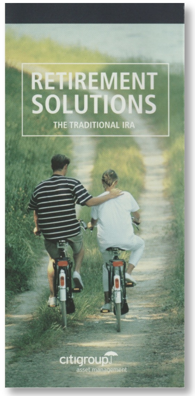


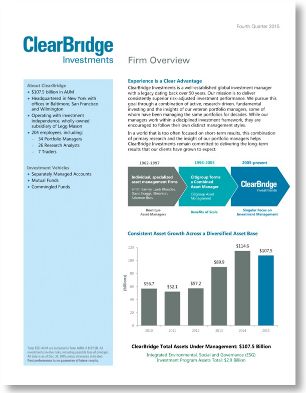
Brand Collateral & Sales Enablement

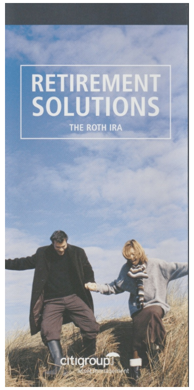
- Firm and branding materials produced in collaboration with C-suite and sales team leaders
- Firm-level Market Views developed in conjunction with CIO and Investment Strategists
- Value-Added content and Sales Enablement materials for retail and advisor channels





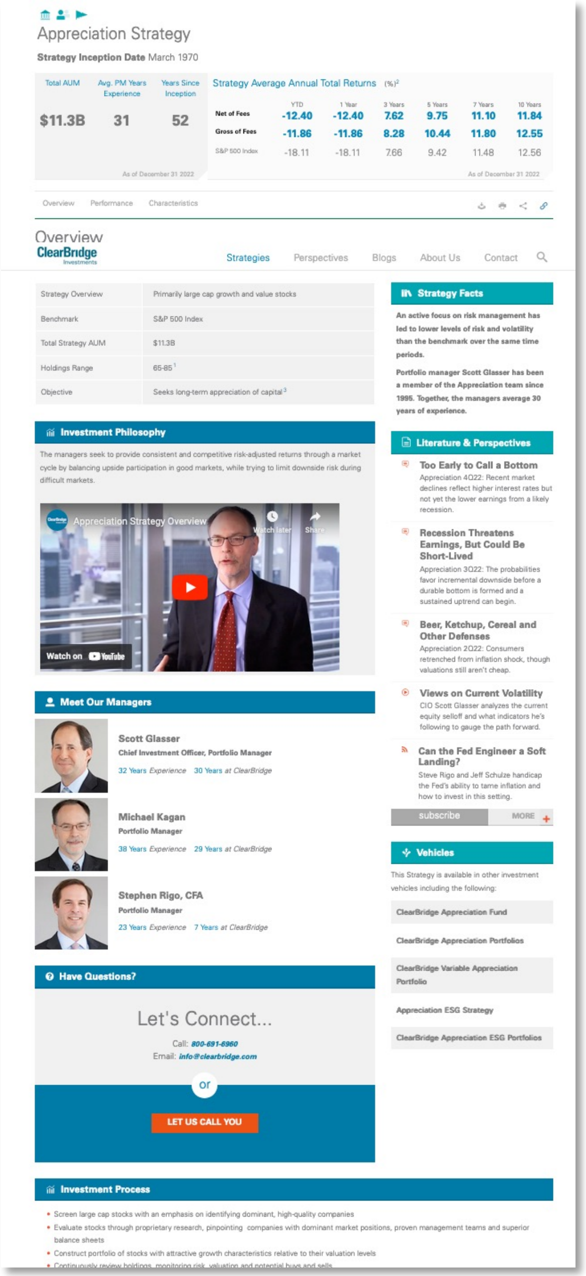






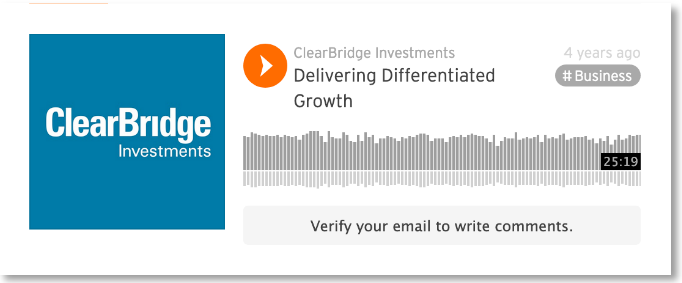
Videos

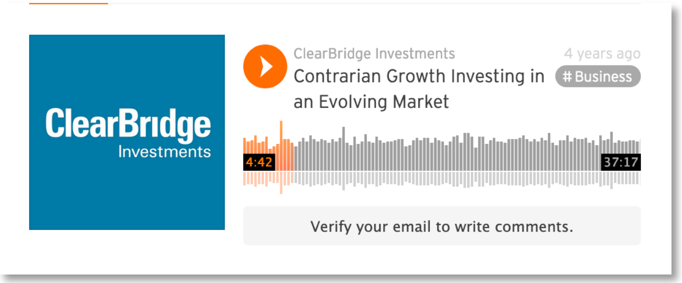
- Produced 25+ evergreen strategy and brand videos, 50+ quarterly PM updates, Investment Strategy updates, and webinar replays that earned 60K+ views
- Evergreen product videos were embedded into website pages for key strategies
- Video production methods included:
    - Full professional crew working onsite
    - Staff production with outside editor
    - 3rd party for paid or earned media
    - Staff or partners at events
- Full archive of videos can be seen here: https://www.clearbridge.com/perspectives/video/index



Podcasts

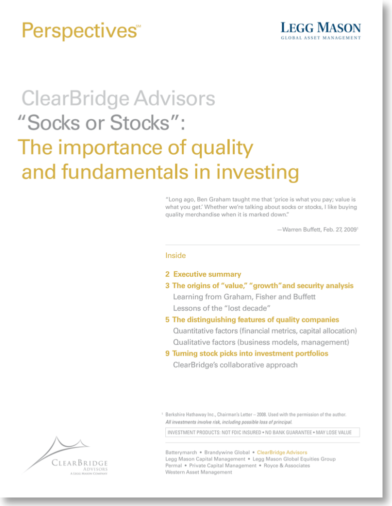
- Created "Authentically Active: The ClearBridge Podcast" in 2017
- Produced 30+ episodes and grew audience to 30K+ listens.
- Managed its monthly editorial planning, production, and distribution.
- Co-developed content with Investment Strategist and host Jeffrey Schulze, CFA
- Coached on-air guests
- Edited scripts and transcripts, which were made available for download or used to create print collateral
- Coordinated compliance approval
- Integrated programs into website and social media platforms

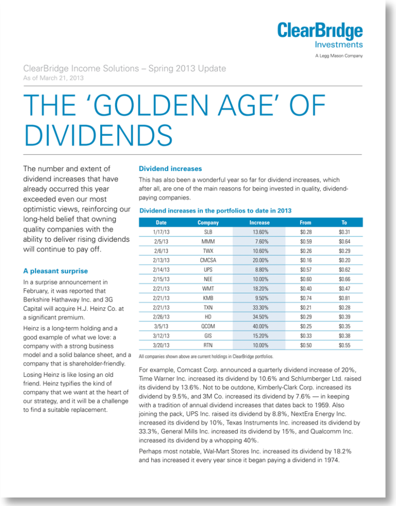


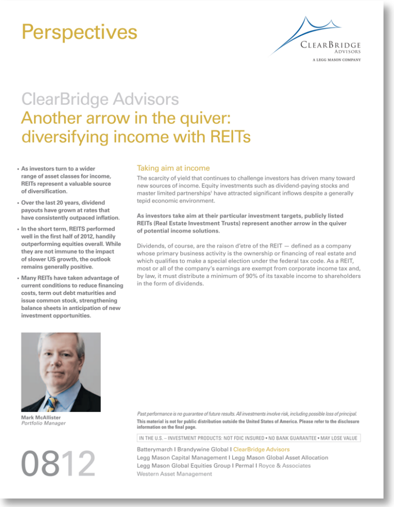


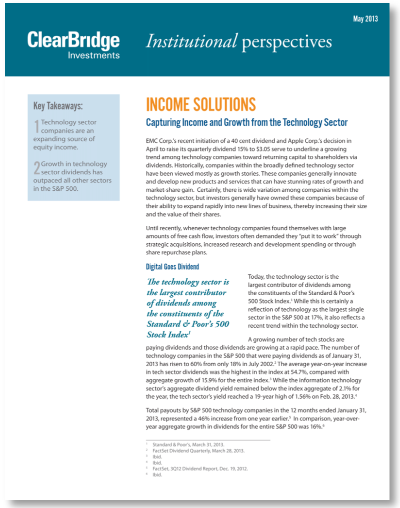
Thought Leadership

- Wrote, co-wrote, edited, or project managed multiple white papers focused on topics in active equity management and featured asset classes
- Planned and executed campaigns to promote and distribute of thought leadership content through featured website content, companion videos, blog posts, social media, and email



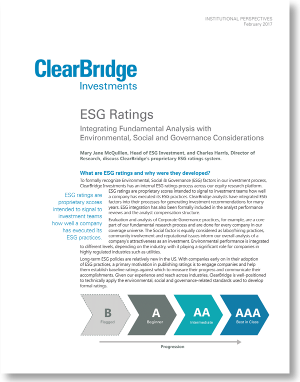


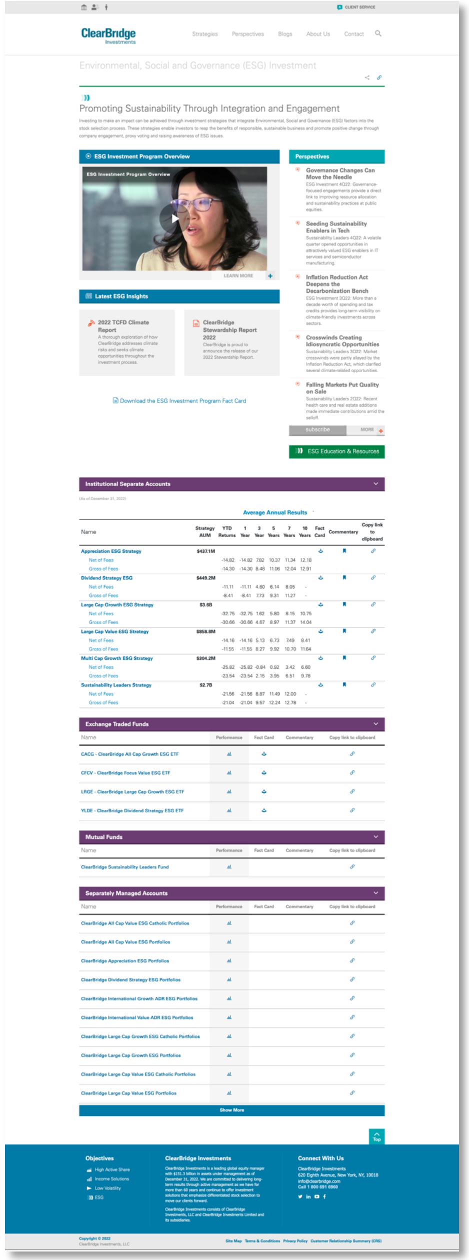


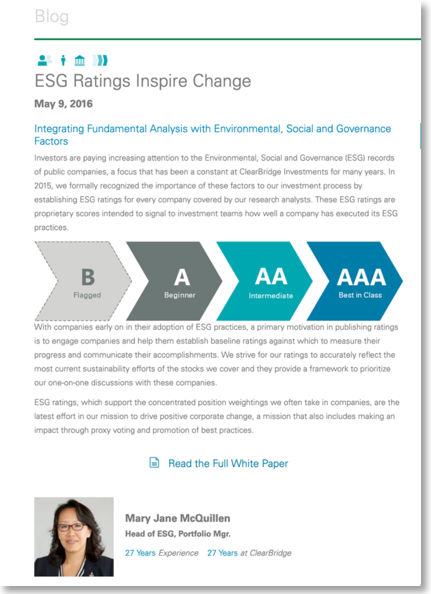


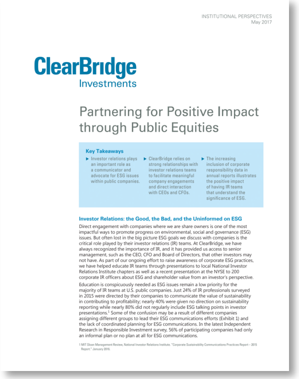
ESG Investment Content

- Developed a large library of ESG related thought leadership content and product collateral
- Edited the first annual ESG Impact Report
- Integrated ESG into branding at the firm level



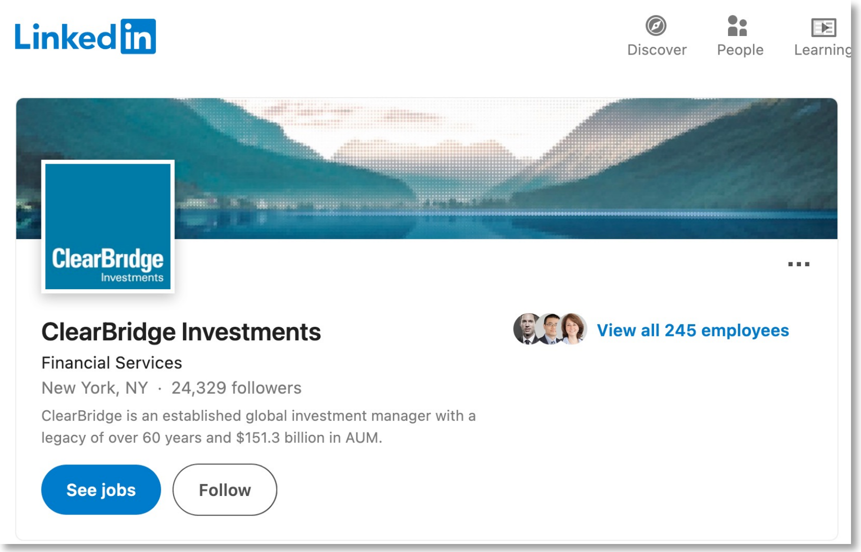


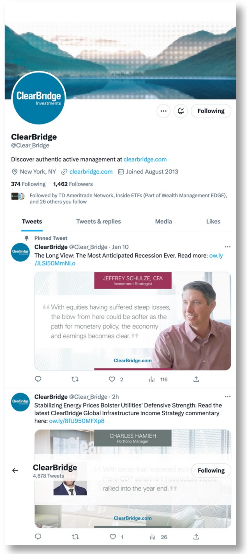


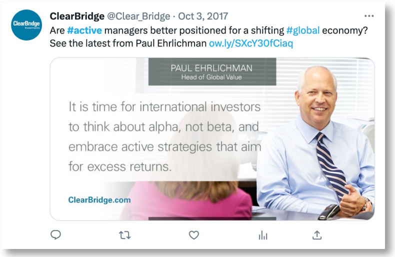


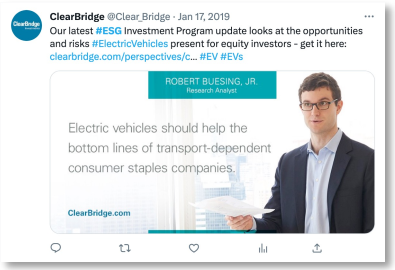
Social Media

- Created and led the social media program at ClearBridge Investments
- Built platform pages (Twitter, LinkedIn, Facebook) and audiences
- Co-developed policies and procedures with compliance and created content templates and formats with design team
- Content strategy featured support for product and thought-leadership marketing campaigns, sponsored events, and amplifying earned and paid media coverage
- Used Hootsute to schedule and publish content, manage approved users, incorporate compliance review, and manage recordkeeping
- Led training and support for approved users
- Built brand awareness and drove traffic to website



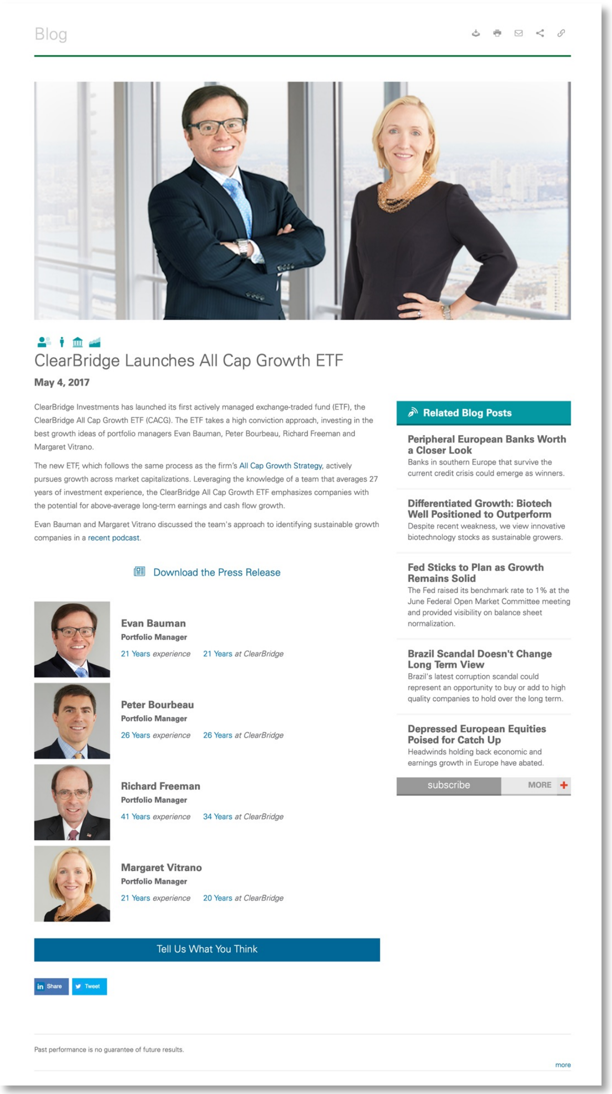


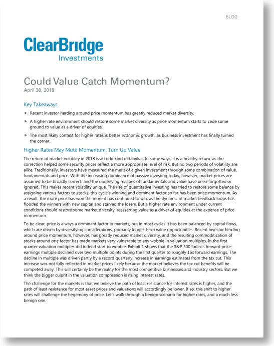


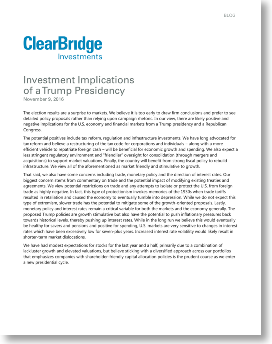


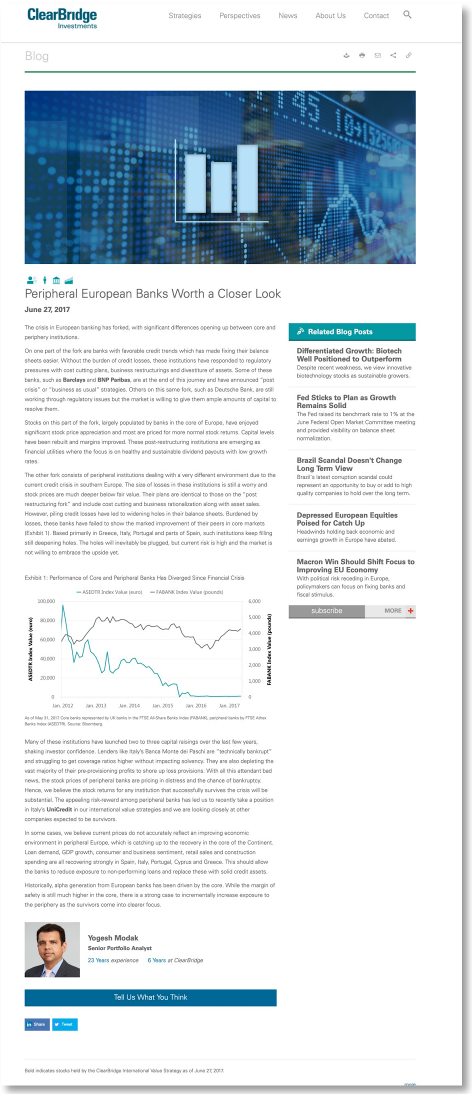
Blogs

- Offer Speed and Versatility
  - Can be produced quickly enabling rapid responses to market or external events
  - Enables promotion of content not hosted on proprietary site
  - Tone can be more informal
  - Suitable for “test and learn” content
- Ideal to promote new content or as support for ongoing campaigns
- Ties together different elements of a campaign in one place (i.e. video, white paper, press release, new product page, etc.)
- Makes long-form content “snackable” for promotion via social media or link from a more prominent page



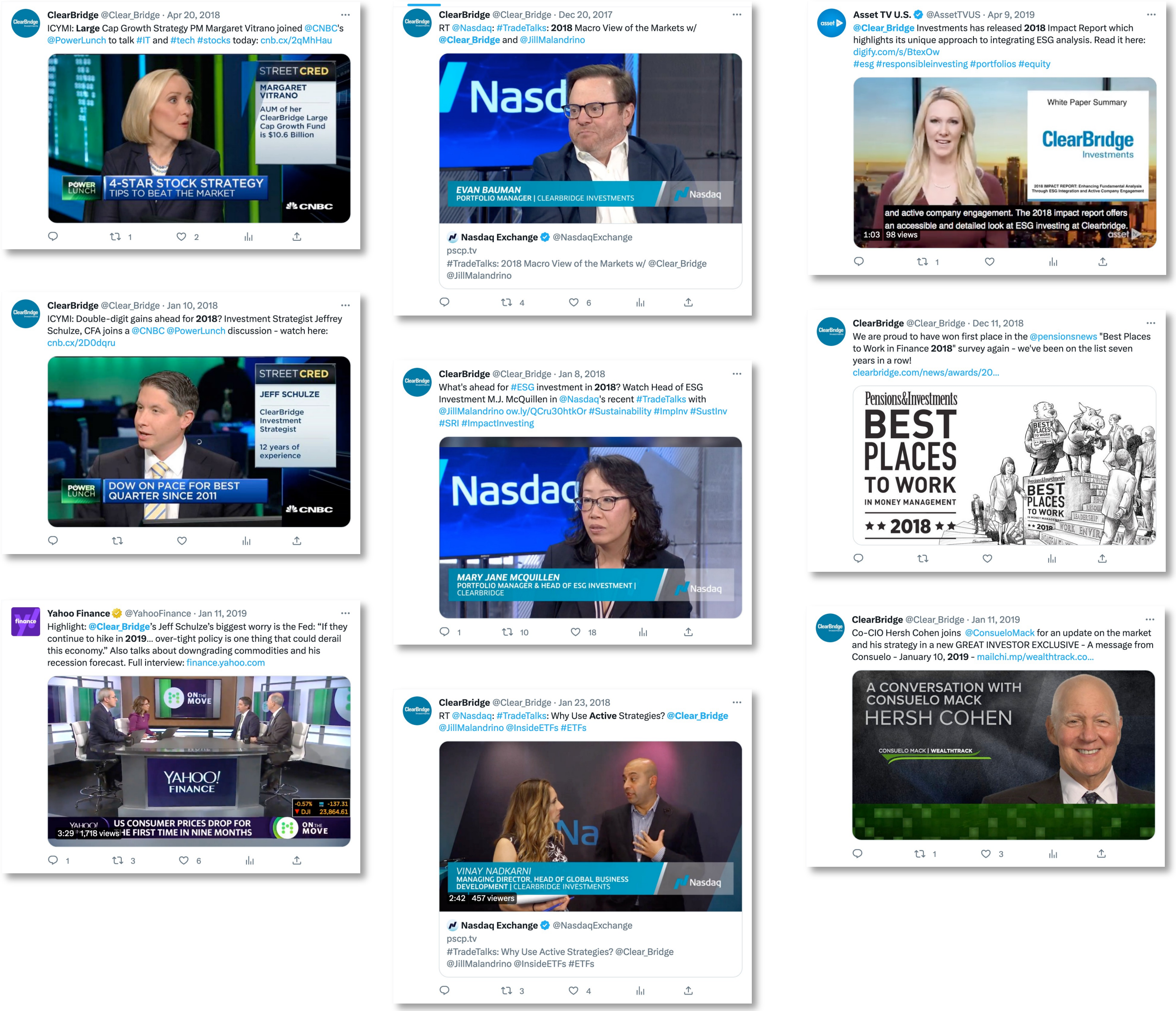






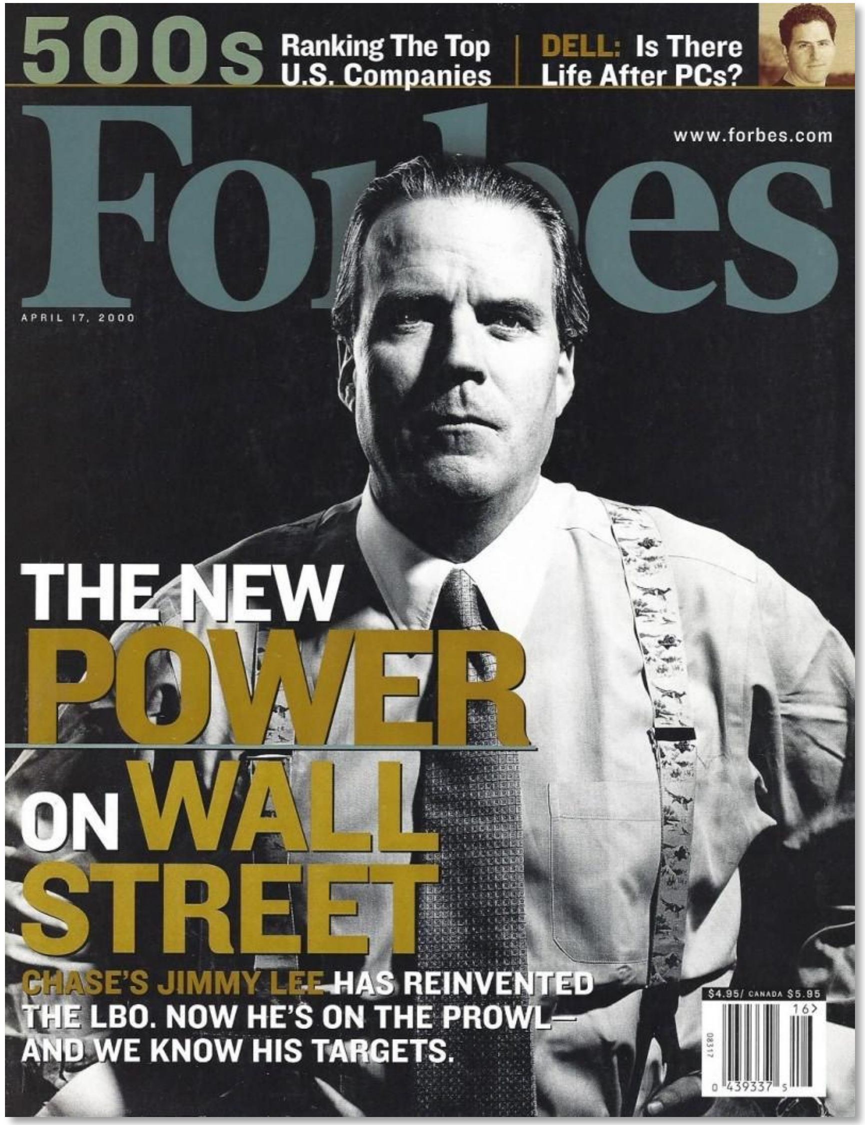
Earned and Paid Media Coverage

- Coordinated planning, schedules, and content with in-house communications team to optimize PR reach and marketing impact of campaigns
- Frequent coverage and appearances in Barron’s, WSJ, Pensions & Investments, Institutional Investor, Yahoo!Finance, AssetTV, Nasdaq MarketSite, FoxBusiness, CNBC SquawkBox, and Consuelo Mack’s WealthTrack
- Trafficked licensed reprints and video replays from paid and earned media on website and via social media



Journalism Work

- Forbes Magazine and Forbes.com
  - Wrote articles for the “Stock Focus” and “Street Fight” series
  - Led team of writers, editors, and data specialists on special projects
- American Banker newspaper
  - Covered syndicated lending and corporate finance
  - Reported and broke news for daily publication
- The F.E.R.C. Report
  - Reported and edited a bi-weekly newsletter on bank regulation, supervision, and examinations

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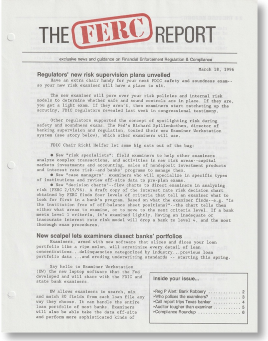
The Daily Financial Services Newspaper
Today's News
Big Banks' Profits Seen Up 12%—But Is Party Over?
Agent of Change
H&R Block Aiming for Big Returns From the Subprime Mortgage Game


Corporate Finance
Institutional Investors Drive Leveraged Lending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Contact

omribenamos@gmail.com

1 (917) 376-3747

Resume