



CASE STUDY

Amplifying social presence with a research-backed competitive strategy

elevationb2b.com



elevationmarketing

BACKGROUND

Dinan is an investment banking services company with proven leadership in middle-market mergers and acquisitions

Dinan has more than 30 years of experience providing the highest standards of professionalism, sophistication and execution expertise in merger and acquisition (M&A) transactions to middle-market companies, comparable to that afforded to the Fortune 500 by full-service Wall Street investment banks. Established in 1988 as a U.S.-focused company, it now has affiliate relationships with experienced M&A professionals in 30

countries worldwide. The company specializes in nine sectors, including aerospace, energy, technology, healthcare and business services. It has earned a reputation for successfully initiating, negotiating, structuring, and closing mergers, acquisitions and divestitures in a variety of transaction structures. As of mid-2020, Dinan has closed more than 600 transactions with a total transaction value of \$50 billion. Its headquarters is in Phoenix, Arizona.

As of mid-2020, Dinan had closed
\$50 billion in transactions





CHALLENGE

Dinan needed to amplify its social presence to capture share in a highly competitive market

Building a brand presence through social media is one of the most cost-effective ways to raise awareness and enhance perception with target audiences worldwide. Even as a well-thought-of partner in the M&A space, Dinan lacked the strategic social media presence to increase brand equity and reinforce its position as a thought leader.

Dinan focuses on two areas of the industry—buy side and sell side—which gave it ample opportunity to create and share content tailored to clients and prospects in its target markets. Dinan engaged Elevation Marketing to raise its profile on social media to increase mindshare, attract qualified leads, build engagement and win new business.



STRATEGY

A multi-phase approach prepares Dinan to successfully execute a comprehensive social media plan

Phase 1: Research and Discovery

Elevation conducted a comprehensive social media analysis to determine Dinan's performance against key social media metrics and uncover opportunities to promote its investment banking, M&A and merchant banking advisory services.

- Audience development: followers and reach
- Audience engagement: mentions and conversations
- Brand awareness: share of voice
- Brand positioning: average sentiment relative to competitors

For seven days, Elevation looked at the sentiment, strength, frequency and reach of 34 topics relevant to Dinan's services to understand where conversations around the company's interests were happening. Elevation also conducted an informal audit of 16 competitors to gauge active social media engagement and the number of opportunities they were leaving on the table. Views, followers, tweets and likes were tracked across Google +, Twitter, Facebook and LinkedIn.

A thorough media audit was also conducted to determine which news outlets, business journals and trade publications Dinan should target with its social media efforts. Boolean keyword consolidation and specific criteria reduced 12,000+ articles found in the preliminary search to 4,871 articles, each of which was reviewed for relevance.

Elevation also reviewed all of the content on the Dinan website to determine what needed to be updated or created for a robust social media program.

Social Media Analysis & Strategy Recommendations



Topic Search Term	Sentiment	Strength	Frequency	Reach
Mergers and acquisitions	14.1	24%	20 sec	25%
Disturbances	3.0	9%	1 hr	0%
Fortune 500	4.1	39%	42 sec	31%
Middle market	27.0	36%	43 sec	14%
Private equity	6.1	28%	29 sec	14%
Proprietary deal flow	22.0	44%	44 sec	20%
Deal flow	6.0	9%	56 sec	12%
Restructuring	4.1	61%	24 sec	40%
Secured clients	25.0	23%	45 sec	24%
Strategic mergers	1.1	0%	2 days	0%
Minority capitalizations	7.1	97%	24 sec	55%
Majority capitalizations	6.1	38%	27 sec	20%
Leveraged buyouts	9.1	33%	33 sec	28%
Investments	3.1	61%	40 sec	40%
Buy-sell agreements	1.1	25%	27 sec	29%
Succession planning	7.1	64%	43 sec	45%
ESOPs	1.1	3%	40 sec	2%
Merchant banking	8.1	10%	31 sec	18%
Exit strategy	4.1	8%	2 hr	0%
Private mergers and acquisitions	7.1	86%	37 sec	22%
Deal flow	7.0	1%	11 hr	3%
Strategic acquisitions	9.0	52%	29 sec	34%
Corporate acquisitions	5.0	34%	40 sec	12%
Investment banking	38.1	51%	43 sec	22%
Acquisition search	10.1	59%	36 sec	37%
Built an acquisitions	4.1	44%	45 sec	8%
Acquire acquisitions	5.0	58%	30 sec	30%
Proprietary acquisition	9.1	42%	41 sec	18%
Merger and acquisition advisor	15.1	31%	29 sec	20%
Management buyouts	3.1	42%	29 sec	22%
Growth capital financing	28.1	47%	38 sec	14%
Strategic acquisitions	12.0	64%	43 sec	43%
Private equity fund	14.1	26%	30 sec	11%
Private equity group	17.0	33%	37 sec	19%

"Sentiment" refers to the ratio of mentions that are generally positive to those which are negative, whereas "Strength" is the likelihood that the topic is being discussed in social media via a simple calculation of phrase mentions within the last 24 hours divided by total possible mentions. And finally, "Reach" is a measure of the range of influence determined by the number of total source authors referencing the topic divided by the total number of mentions.

Social Media Analysis & Strategy Recommendations



While not exhaustive, these findings represent a baseline of business opportunities for potential early stage sales conversions and validate the need for strategic guidance. Dinan's social media engagement, with a healthy and engaged presence on the most widely used social networks, Dinan has the chance to reach potential customers with whom competitors currently have more influence, or where competitors do not have a social media presence.

Below are examples of social media activity by topic across a seven-day timeline. The results reinforce that conversations around Dinan's interests are happening in social media and the data provides key insights to guide the specific channel recommendations and tactical implementation priorities.

Analysis for investment banking (May 8, 2015 to May 14, 2015)

The results below are derived from the proprietary number of mentions which is based on the volume of mentions generated from all sources and not just those generated from social media. The results are presented in a format that is easy to understand and provides key insights to guide the specific channel recommendations and tactical implementation priorities.

Total Mentions: 2,105

Days Since Volume (May 8, 2015)



Analysis for mergers & acquisitions (May 8, 2015 to May 14, 2015)

The results below are derived from the proprietary number of mentions which is based on the volume of mentions generated from all sources and not just those generated from social media. The results are presented in a format that is easy to understand and provides key insights to guide the specific channel recommendations and tactical implementation priorities.

Total Mentions: 885

Days Since Volume (May 8, 2015)



Social Media Analysis & Strategy Recommendations



A tactical social media plan should extend the demographic definitions of the target audience to explicitly reference preferred social networks and patterns of engagement.

An informal audit of Dinan's competitors, summarized below, confirms active social media engagement from some competitors as well as a number of opportunities some competitors are leaving on the table.

Channel/Company	Views	Followers	Following	Tweets	Likes	Retweets	Comments
Dinan	27,563	31	0	0	19	0	3%
Harvey & Company	119	119	119	119	42	0	119
Richard Vander Kley & Associates	119	119	119	119	119	119	30
Harvesters	2,226	162	198	240	0	0	5
Cook USA Advisory Services	119	119	119	119	119	119	48
Huettner Lohr	3,794	209	0	0	434	0	12,126
Lesant Middle Market	119	119	119	119	119	119	14
Lincoln International	119	432	303	395	119	119	4,299
Harris Williams	119	119	119	119	119	119	2,807
Headwaters MS	12,336	342	409	321	119	119	6,477
Deutsche	68,002	48,000	1,800	8,242	57,975	826,112	1,126,801
Deutsche Partners	119	119	119	119	119	119	856
Artisan Group	251,126	3,114	148	400	475	0	119
Duff & Phelps	87,669	695	87	123	314	0	12,414
Imperial Capital	119	119	119	119	119	119	654
Piper Jaffray	147,098	299	112	50	188	7	11,299
William Blair & Company	2,851	400	438	308	1,193	5	3,330

Recommended Platform Hierarchy

1. Twitter
2. LinkedIn
3. Google+
4. Facebook

STRATEGY

Phase 2: Research Synthesis

Knowing that a healthy and engaged presence on the most widely-used social networks would give Dinan the chance to reach potential customers on the buy and sell sides of the industry, Elevation used the information uncovered during Phase 1 to create a baseline of business opportunities where social media users were talking about the types of products and services the company specialized in.

Elevation determined that there was no market leader in terms of social media presence. Most social content was focused on the industry in general. The media audit identified keywords that could generate interest and drive traffic to Dinan's social media channels. Keywords related to strategic acquisitions led the way, followed by M&A restructuring and private equity, and management buyouts. Dinan had an opportunity to reach prospects by implementing a cohesive, consistent strategy focused on relevant content to spark sharing and conversation.

With social tools and a content strategy tailored to its audiences, Dinan could enjoy a thriving, engaging presence on social media. Insights gleaned from the research analysis guided channel recommendations and tactical implementation priorities aimed at giving

the company the ability to reach potential customers with whom competitors had more influence, or to own the leadership position where competitors did not have a social media presence.

Phase 3: Strategy Recommendations

Elevation produced an in-depth social media guide and tactical recommendations by channel for the Dinan team. The guide walked them through how to optimize company profiles/pages and:

- Build followers on Twitter, as well as test Twitter chat for industry discussion and use sponsored tweets and/or accounts in a paid advertising model
- Create LinkedIn showcase pages for individual products/services, engage with LinkedIn groups and relevant brands, and test the efficacy of LinkedIn advertising
- Join communities and engage with brands on Google+, apply for +Search, build a library of shared images and explore Google Ripples
- Engage with brands on Facebook, develop a library of customizable visual content, add custom tabs and test paid advertising options

The guide also showed the Dinan team how to use audience research and revenue ratios to determine content focus, which types of content performs best on each social media channel, and how often and when to post it. Based on the findings in the media analysis, Elevation offered several recommendations to position Dinan positively in the investment banking vertical:

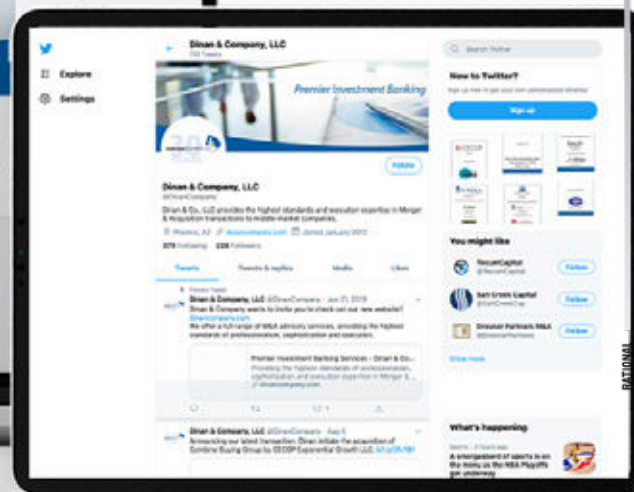
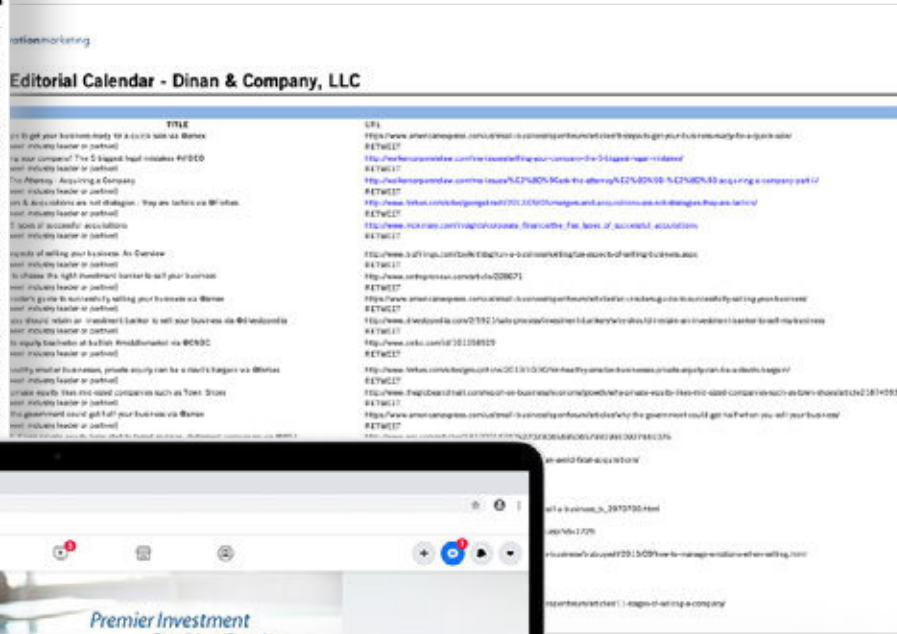
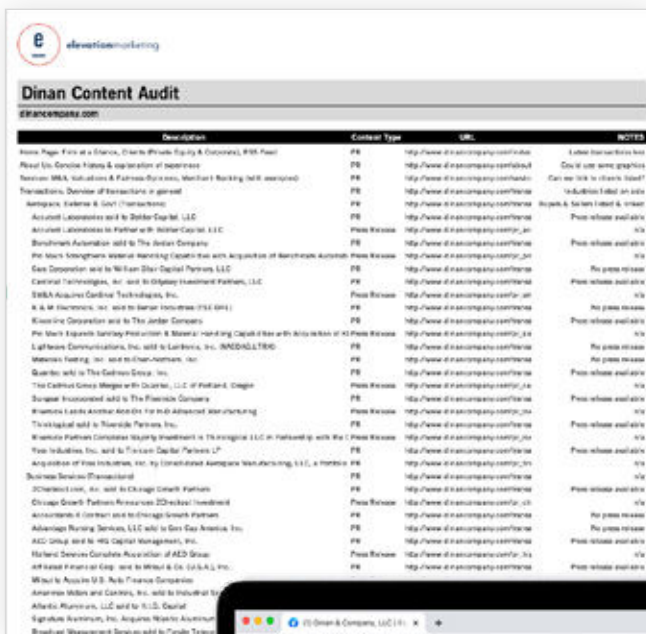
- Establish a thought leadership role using Dinan's senior leadership team and investment banking experts
- Make positive Dinan news as accessible as possible to drive trade media coverage
- Be authentic—curate content featuring real customer success stories and share it on a regular basis
- Pitch success stories to target outlets to maximize impact
- See and be seen at trade shows

Phase 4: Execution

To prepare the Dinan team to successfully execute the strategy recommended by Elevation, new creative assets were produced for each social media channel, along with SEO-enhanced profiles. Elevation also initiated the Dinan editorial calendar, mapping out the first month in detail as a template the team could replicate and refine throughout the year.

MEDIA CONTENT FOCUS:

- Pitch success stories
- Establish national thought leader role
- Be authentic
- Make positive dinan news as accessible as possible



- Social media audit
- Media audit
- Content audit
- Research synthesis
- Target media recommendations
- Strategy recommendations by social media channel
- Graphics and social profiles for all channels
- Editorial calendar
- Implementation guide



ABOUT ELEVATION

Full-Funnel Marketing Solutions for Today's B2B Buyers.

Elevation Marketing creates meaningful customer engagements and sustainable results through data-driven, digital-first solutions that inspire change, motivate action and deliver predictable outcomes. Whether it's brand, demand, ABM, channel or sales enablement, we are experts in connecting brands to people and performance through end-to-end B2B marketing programs. By looking at your brand through the lens of your business, we help you break through the

obstacles that stand between you and greater sales, increased market share and increased revenue for maximum return on your investment.

**Ready to discuss
your project?**

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