DARIEN GROUP

Institutional by Design

The Brand & Marketing Checklist for Private Equity Firms

What every private equity firm should have formalized to build visibility, credibility, and trust with investors, intermediaries, and founders.

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Fifty items across ten categories, from positioning and identity to investor materials and governance.

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Your reputation is already working. Is your brand keeping up?

Private equity firms spend years building track records, relationships, and expertise. Yet many still present themselves with a patchwork of materials that undersell the firm behind them.

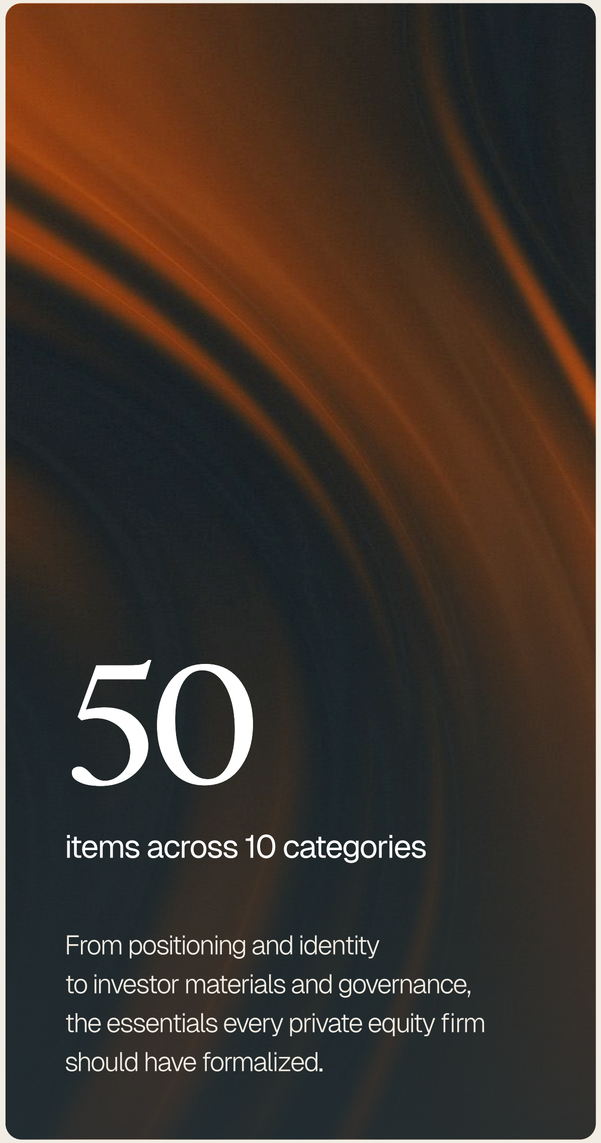
That gap matters more than ever. Limited partners, placement agents, bankers, and founders now form impressions long before the first meeting. They review your website, scan your team's LinkedIn profiles, read your announcements, and compare your materials against dozens of peers. In a crowded fundraising market with longer timelines, those impressions shape who gets a meeting and who gets passed over.

Brand in private equity is not about flash. It is about clarity, consistency, and credibility: making it easy for every audience to understand what you do, why you are different, and why they should trust you with capital, a company, or a career.

Most firms we encounter have pieces of a brand in place. A logo here, a deck there, a website that was current two funds ago. What is often missing is a formalized, connected system where every asset reinforces the same story.

This checklist is designed to help you see your firm the way outside audiences do. It covers the strategic foundations, visual assets, digital presence, investor and sourcing materials, and governance that together create a strong, visible brand.

Use it to take stock of what you have, identify what is missing, and prioritize where to invest next. Whether you are preparing for a fundraise, welcoming new partners, or simply overdue for a refresh, it is a practical place to start.



02. About Darien Group

Built for private equity.

A branding and communications agency built exclusively for investment managers. Since 2015, we have helped private equity firms, real estate investors, and other alternative managers explain who they are, persuade the audiences that matter, and earn trust over time.

2015
Founded

400+
Clients Since Inception

275+
Investor Presentations

90+
Websites Launched

Raising capital and winning deals are not about marketing in the conventional sense. They are about explanation, persuasion, and credibility, repeated across sophisticated audiences who are often evaluating you under real scrutiny.

We bring strategy, storytelling, design, and execution together under one roof. Not PR. Not generalist design. A team that speaks the language of capital and pairs it with world-class creative, serving as a steady partner as your platform evolves.

How We Help Investment Managers

Brand	Messaging and positioning, visual brand development, style guides, collateral systems, and brand audits
Web	Institutional-grade websites, SEO and LLM optimization, and maintenance and hosting
Materials	Pitchbooks, PPMs, AGM support, year-in-review pieces, and ESG reports
Support	Website optimization, investor and management communications, and presentation design

Trusted by **48 of the PEI Top 300** private equity firms. **100%** focused on investment management clients.

How we think about brand for private equity

Before diving into the checklist, it helps to understand the principles behind it. These shape how we approach every private equity brand.

01 Brand is the sum of every interaction.

A private equity firm's brand is the total of all interactions with, and perceptions of, the firm, its people, and its presence, among every constituent in its ecosystem. Your website and materials are the most controllable, highest-leverage parts of that sum.

02 Differentiation must be specific and provable.

Phrases like "operational value creation" and "true partnership" have become table stakes. Strong positioning rests on proof: sector depth, a distinctive sourcing model, the makeup of your team, and the outcomes you have delivered.

03 You have many audiences, but one story.

LPs, founders, bankers, and prospective hires care about different things. They need different emphasis, not different narratives. A strong core story flexes for each audience without losing coherence.

04 Message before design.

Strong design amplifies a clear story; it cannot replace one. Defining what you want to say, and to whom, comes before any decision about how it looks. Consistency then compounds: firms that sound the same everywhere earn trust faster.

05 Your brand should evolve with your fund cycle.

A new fund, a new strategy, new leadership, or a growing team are natural moments to revisit positioning. The firm you are today may have outgrown how you described yourself three years ago.

Everything your firm should have formalized

Check each item your firm has fully in place and current. Partial or outdated items should stay unchecked. You will tally your results at the end.

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I.

Strategy & Positioning

The foundation everything else is built on. Without it, every other asset is guesswork.

Message Before Design

Positioning is the input to everything that follows. A new logo, website, or pitch deck built on unclear positioning tends to look polished but say little. Firms that invest in strategy first find that design, copy, and materials come together faster, stay consistent longer, and require fewer rounds of revision.

- [ ] **Positioning statement**
  A single, clear articulation of what you invest in, for whom, and why your firm is the right partner.
- [ ] **Defined differentiators**
  Three to five specific, defensible advantages, each supported by evidence rather than adjectives.
- [ ] **Proof points library**
  Track record highlights, sector depth, sourcing data, and outcomes that substantiate your claims.
- [ ] **Audience map**
  A clear view of who you need to reach (LPs, intermediaries, founders, talent, co-investors) and what each needs to hear.
- [ ] **Core messaging framework**
  Approved language for your mission, approach, and value creation, used consistently by the whole team.
- [ ] **Firm boilerplate**
  Standard short and long firm descriptions for press releases, directories, and partner materials.

II.

Visual Identity

Your identity signals quality and stability before anyone reads a word.

- [ ] **Logo suite**
  Primary, secondary, and icon versions, with reversed and single-color files for every use case.

- [ ] **Color and typography system**
  A defined palette and type hierarchy that works across print, screen, and presentation.

- [ ] **Brand guidelines**
  A documented reference so internal teams and outside vendors apply the brand correctly.

- [ ] **Imagery direction**
  A point of view on photography and illustration that avoids generic stock and reflects your firm.

- [ ] **Data visualization style**
  Consistent chart, table, and infographic standards for performance and portfolio data.

- [ ] **Branded templates**
  PowerPoint, Word, letterhead, and email signatures that make on-brand work the default.

III.

Website

For most audiences, your website is the first real diligence step.

- [ ] **Clear homepage positioning**
  A visitor should understand who you are and what you do within a few seconds.
- [ ] **Strategy or approach pages**
  Dedicated content explaining your investment focus, sectors, and how you create value.
- [ ] **Team page**
  Consistent professional headshots and standardized bios for every team member.
- [ ] **Portfolio page**
  Current and realized investments, ideally filterable, with case studies where possible.
- [ ] **News and insights**
  An actively maintained section that shows momentum and expertise.
- [ ] **Investor and contact paths**
  Easy access to the LP portal, inquiries, and the right points of contact.
- [ ] **Technical foundation**
  Responsive, accessible, fast, and secure, with a hosting and maintenance plan.
- [ ] **Disclosures and analytics**
  Compliance-reviewed disclaimers, plus analytics on who is visiting.

IV.

Fundraising & Investor Materials

Materials LPs scrutinize closely and compare directly against your peers.

- [ ] **Pitch deck**
  A fundraising presentation aligned with your current positioning and brand standards.
- [ ] **Fund teaser or one-pager**
  A concise leave-behind for first conversations and introductions.
- [ ] **Case studies**
  A consistent format for telling portfolio stories, from thesis to outcome.
- [ ] **Quarterly letter and report templates**
  Designed, repeatable formats that make regular reporting efficient and polished.
- [ ] **AGM presentation template**
  A framework for your annual meeting that elevates the investor experience.
- [ ] **Year-in-review piece**
  A narrative summary of the year that reinforces your strategy and relationships.
- [ ] **DDQ-aligned messaging**
  Marketing language that matches what you say in diligence questionnaires.

V. Deal Sourcing & Intermediary Materials

The audiences who bring you deals deserve the same polish as your LPs.

- [ ] **Investment criteria tearsheet**
  A clear, scannable summary of what you look for, built for bankers and brokers.
- [ ] **Sector or strategy one-pagers**
  Focused materials that demonstrate depth in your target verticals.
- [ ] **Founder-facing materials**
  A compelling answer to “why partner with us,” written for business owners and management teams.
- [ ] **Portfolio testimonials**
  Endorsements and references from CEOs and founders you have backed.

VI. People & Talent

In private equity, your people are your product.

- [ ] **Standardized bios**
  Short and long versions for each professional, consistent in structure and tone.
- [ ] **Consistent headshots**
  A unified photography style across the team, updated as people join.
- [ ] **Aligned LinkedIn profiles**
  Accurate titles, firm descriptions, and banner imagery across the team.
- [ ] **Employer brand**
  A careers page or messaging that explains why talented people should join you.

VII. Thought Leadership & Content

Content builds familiarity long before a fundraise or a deal.

- [ ] **Defined content themes**
  Two to four topics tied to your expertise that you can credibly own.
- [ ] **Editorial calendar**
  A realistic publishing plan with clear owners and review steps.
- [ ] **Active LinkedIn company page**
  A regular cadence of firm news, insights, and portfolio highlights.
- [ ] **Newsletter or commentary**
  Periodic market perspective that keeps your network engaged.

VIII. Ongoing Communications

Prepared firms control their story; unprepared ones react to it.

- [ ] **Press release template**
  A standard format and approved boilerplate for announcements.
- [ ] **Announcement process**
  A defined workflow for deal, fund, and hire announcements, including approvals.
- [ ] **Media kit**
  Logos, bios, headshots, and firm facts ready to share on request.
- [ ] **Portfolio company coordination**
  A clear process for joint announcements, quotes, and sign-offs with portfolio companies.

IX. Governance & Brand Management

The structure that keeps your brand consistent as your firm grows.

- [ ] **Compliance review workflow**
  A clear process for reviewing marketing materials with your compliance team.
- [ ] **Central asset library**
  One accessible home for logos, templates, photography, and approved copy.
- [ ] **Brand ownership**
  A defined owner for brand and marketing decisions.
- [ ] **Trademark protection**
  Registration of your firm name and logo, handled with legal counsel.

X. Third-Party Presence

Your brand lives in more places than you control directly.

- [ ] **Accurate data profiles**
  Up-to-date firm information on industry databases and directories.
- [ ] **Consistent descriptions**
  The same core firm description everywhere your name appears.
- [ ] **Search results review**
  A periodic check of what people see when they search for your firm.

Keep It Current

A brand is never finished. Revisit this checklist at least once a year, and again at key moments: before a fundraise, after a new fund closes, when senior team members join or depart, or when your strategy evolves. Small, regular updates are far easier than a full overhaul every few years.

How does your firm measure up?

Count the items you checked across all ten categories, then find where your firm lands.

My total

_____ / 50

Where to Start

Start with strategy. If Category A has gaps, address them first. Identity, website, and materials built on unclear positioning will need to be redone later.

Follow your calendar. If a fundraise, AGM, or major announcement is on the horizon, prioritize the assets that audience will see first.

40–50

Well established

0 10 20 30 40 50

Your firm has a strong, formalized foundation. The opportunity now is refinement: sharpening differentiation, keeping materials current, and making sure every touchpoint works together as your firm grows.

20–39

Solid pieces, missing connections

0 10 20 30 40 50

You have many of the essentials, but likely gaps in how they connect, or assets that have drifted out of date. A focused review of positioning and core materials can bring everything into alignment.

0–19

Significant opportunity

0 10 20 30 40 50

Your brand may be underselling your firm. A structured brand effort, starting with strategy and messaging, would likely have an outsized impact on how investors, intermediaries, and founders see you.

Closing the gaps

If your checklist revealed gaps, you are not alone. Most firms have at least a few areas that need attention. Darien Group can support any of these initiatives, whether you need a single deliverable or a complete brand program.

Comprehensive programs

For firms ready for a full refresh, we take a connected approach from strategy through identity, website, and materials, so everything launches as one coherent brand.

Focused projects

For firms with a strong foundation, we take on individual deliverables like a pitch deck, website update, or AGM presentation, built to fit your existing brand.

	Checklist Category	Darien Group Service
I	Strategy & Positioning	**Brand** / Messaging & Positioning
II	Visual Identity	**Brand** / Visual Brand Development, Style Guides & Brand Standards
III	Website	**Web** / Websites, SEO & LLM Optimization, Maintenance & Hosting
IV	Fundraising & Investor Materials	**Materials** / Investor Presentations & Pitchbooks, PPMs, AGM Support, Year-in-Review
V	Deal Sourcing Materials	**Brand** / Collateral Systems
VI	People & Talent	**Brand** / Messaging & Positioning; **Support** / Presentation & Design Support
VII	Thought Leadership & Content	**Support** / Investor & Management Communications
VIII	Ongoing Communications	**Support** / Investor & Management Communications
IX	Governance & Brand Management	**Brand** / Style Guides & Brand Standards, Brand Audits & Refresh Programs
X	Third-Party Presence	**Web** / SEO & LLM Optimization; **Brand** / Messaging & Positioning

07. Start the Conversation

Not sure where to start?

We partner with firms of every size, from first-time fundraises to global multi-strategy platforms. Share your results, goals, and timeline, and we will help you identify the highest-impact next steps, whether targeted or comprehensive in scope.

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