



CASE STUDY: Standing Out in a Sea of “Sameness”



Background

As a midsized financial planning organization, SignatureFD works with high net worth individuals building asset management strategies to help meet their evolving needs. Whether it's asset protection, asset growth or charitable giving, Signature FD builds custom strategies to match the desires of each client. Beyond asset management, SignatureFD helps connect clients to communities of likeminded individuals – whether it's shared vocation, avocation or life stage, SignatureFD has a community in which to can connect people

Challenges

- SignatureFD lacks a clear differentiating brand position in a highly competitive industry where multi-billion dollar competitors are constantly looking to take business.
- The desire to find a unique, differentiating and ownable brand position is difficult in an industry where the perceived category imperatives have become costs of entry (trust & security) and have overshadowed all else, creating an industry of relative sameness
- An additional hurdle includes a lack of internal alignment or brand stewardship creating an environment where decision making is slow and second guessing leads to constantly shifting direction.
- Historically, SignatureFD had not invested in marketing resources to build and sustain insight driven and client/market focused marketing campaigns

Approach

- Led an introductory kick-off meeting with the key leaders and stakeholders to define the project scope and align on objectives
- Conducted quantitative marketing research to understand market perception of the category, the SignatureFD brand as well as critical drivers of preference in the market
- Created a Story & Strategy Playbook focused on new client acquisition as well as expanding services utilized by existing clients
- Developed a comprehensive creative campaign to bring consistency and clarity to all branded material

SIGNATUREFD

Financial Design for Life

Result

- Provided SignatureFD with a clear, concise “story” to describe their current business in terms that both associates and clients can understand and communicate in a consistent manner
- Delivered a structured, prioritized action plan for SignatureFD to implement in support of their vision to become a technology innovator
- Identified key business strategy gaps and organizational requirements (structure and resources) that will be necessary to achieve success with the go-forward vision
- Selected as a 2018 winner of the Top Places to Work (for Financial Planning) in America by Investment News
- Achieved asset growth of ~20% with 11% growth coming from existing client asset growth and nearly 8% growth in new clients.