



Financial Services Forum
Marketing Effectiveness Awards 2021

Agency of the Year **Teamspirit**



Teamspirit



The Financial
Services Forum

Q1 Recent Financial Services Marketing Campaigns

Describe some of your notable recent financial services marketing campaigns, projects or initiatives. What did they achieve? What made them successful?



Navigating Link out of a crisis

Our client, global fund administrator Link Group, found itself at the heart of 'Woodford', the biggest crisis to hit UK fund management in decades. Despite the story's legal and technical complexities, Link asked us to be their voice. In the first three weeks alone we received 300 contacts from journalists, many the results of counter-briefing. Our small team worked 24/7 to ensure facts were accurately reported. Out of 676 pieces of coverage mentioning Link Group (and a further 850 on Woodford), our PR crisis management strategy and financial expertise resulted in just 15 pieces of negative content for our client. A 98% positive sentiment.

676
Pieces of coverage mentioning Link Group

98%
positive sentiment



The Telegraph
Investors lash out at Woodford comeback

The Mail
How CAN this clown return as a fund boss?

Apologetic Woodford comes under pressure to rein in management fees

The star stockpicker could still be earning up to £100,000 a day for his suspended fund, writes Chris Hood

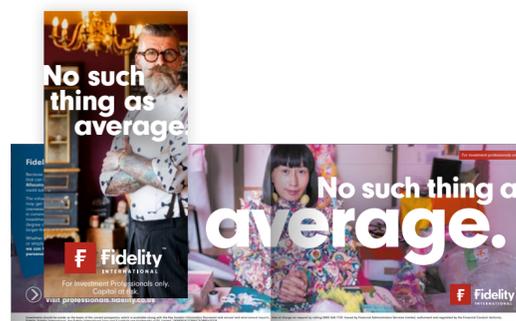


To achieve standout in a crowded category – and support a multi-asset fund range that was languishing 52/65 in the 20-60% IA sales rankings, we redefined Fidelity's multi-asset proposition. We turned propositional wisdom on its head to deliver what advisers badly craved.

We brought our new market-distinct proposition to life in an innovative integrated b2b campaign (No such thing as average) that transformed Fidelity's sales. We exceeded adviser awareness targets by **610%**, with **1 in 4 of all UK advisers (5,842)** engaging with our new online multi-asset experience. Most importantly, the campaign shot us up to **7th in the 20-60% rankings – and second in the multi-asset sector overall for the first time.**

exceeded adviser awareness targets by **610%**

Rose to **2nd** in the UK multi-asset sector



Winning the generation game

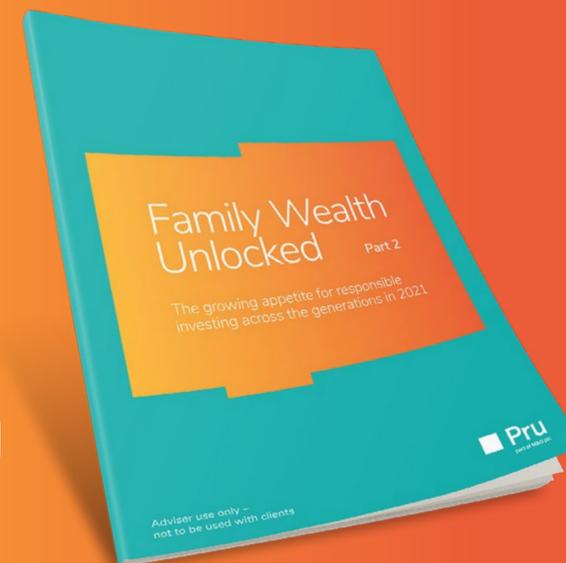
With £5.5trn in UK wealth due to be passed to the next generation by 2047, intergenerational financial planning is an increasingly essential adviser offering. And while Prudential had depth in this market, they weren't known as a go-to provider for it. In 2020 we devised an innovative launch strategy which, with a small budget, created thought leadership content that was downloaded by 1 in 15 of all UK advisers, drove 3,934 adviser visits to their new web hub and generated 1,066 new conversations with Prudential's sales force. Prudential's bond sales shot up to £674m at a cost-effectiveness of just £12.53CPC.

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Q2 Innovation and Product Development

How have you helped clients develop products or services in recent years that generate long-term sustainable growth

For the change we've achieved for clients, we've been voted Investment Week Innovation Agency of the Year for four years in a row.



Informing best use of client budgets.

Robust marketing attribution has long been FS marketers' holy grail. Our data analysts pioneered a revolutionary new data dashboard which integrates multi-channel results feeds in a real-time interface. This is now allowing our clients to better demonstrate ROI and accountability to their boards, securing new budgets and roles.



We evolve market-first propositions to drive better client outcomes

such as Thoughlab which uses BigData-sized loads to identify market knowledge gaps, then creates industry-first content from the findings. Already affecting effectiveness for clients Janus Henderson and Calastone (16% share increase in 6 months).

Transforming channel dynamics.

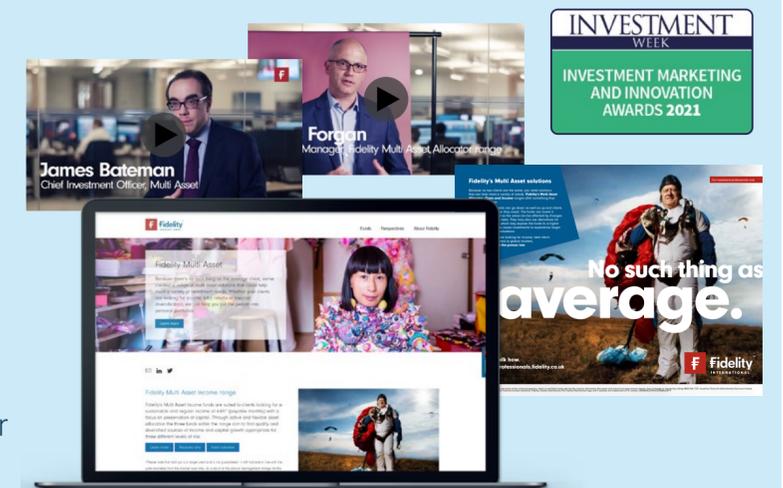
Innovation in UX is more than just increasing how intuitive the user journey is. For Cambridge Building Society, we re-engineered their user experience to replicate their distinct mutual values (transparency, openness, value and service) online. Visits to mortgage pages rose 537% and returning visitors by 41%. Winner of the Best Lender website in the 2020 What Mortgage awards.



Best Lender website

Shaping client propositions

Products can suffer from low share because companies can miss the proposition that offers most value. Immersed in competitors' positionings and audience needs, our planners' surface these, to effect. As one example, for Fidelity, we re-aligned their multi-asset proposition which resulted in Fidelity rising to 2nd overall in the multi-asset sector – and new business preference rising by 15.5%.



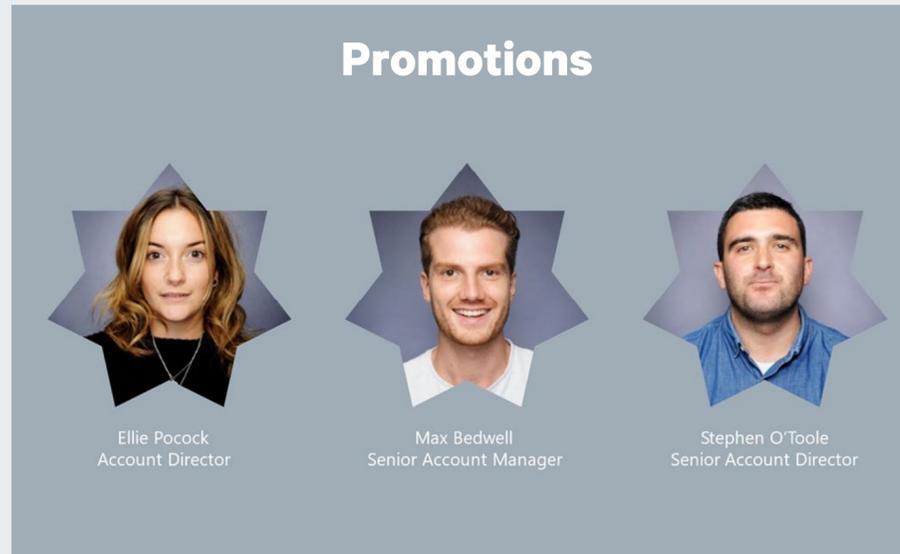
Q3 People and Talent

How does your agency support the improvement of financial services marketing

As a specialist FS agency, we believe employees in every department need to understand the dynamics of core products, distribution and channels to be able to drive marketing effectiveness for our clients. To achieve this change, in the past two years we've tripled our training budget to £120,000. Outcomes have resulted in us being shortlisted in the FSF awards for this, in the 'Transforming the workforce' category.

To ensure personal development and knowledge growth continued at the same pace during lockdown, our Training and Development team devised and ran 32 training sessions on everything from 'Insights on Pensions and SIPPs' to 'The ESG landscape' and 'The evolving needs of advisers'.

In addition, we drew on our industry contacts to drive our unique all-staff 'FS Academy', where fund managers, journalists and IFAs present to us, allowing us to better understand need, and so meet them better for our clients.



We also invest in 'gold standard' external training to drive a higher level of employee understanding, such as the Investment Management Certificate (CFA equivalent) and the 1-year Marketing Week mini-MBA which allows us to take best practice effectiveness from all sectors, and raise the bar by applying them to our industry.

We also believe that to drive new thinking and standards of new talent, we (and the industry) need to look in new places. As a result, we now work with Taylor Bennett and the Leonard Cheshire Foundation and have employed star talent from ethnic and non-degree backgrounds traditionally overlooked by the industry.



Q4 The Financial Services Industry

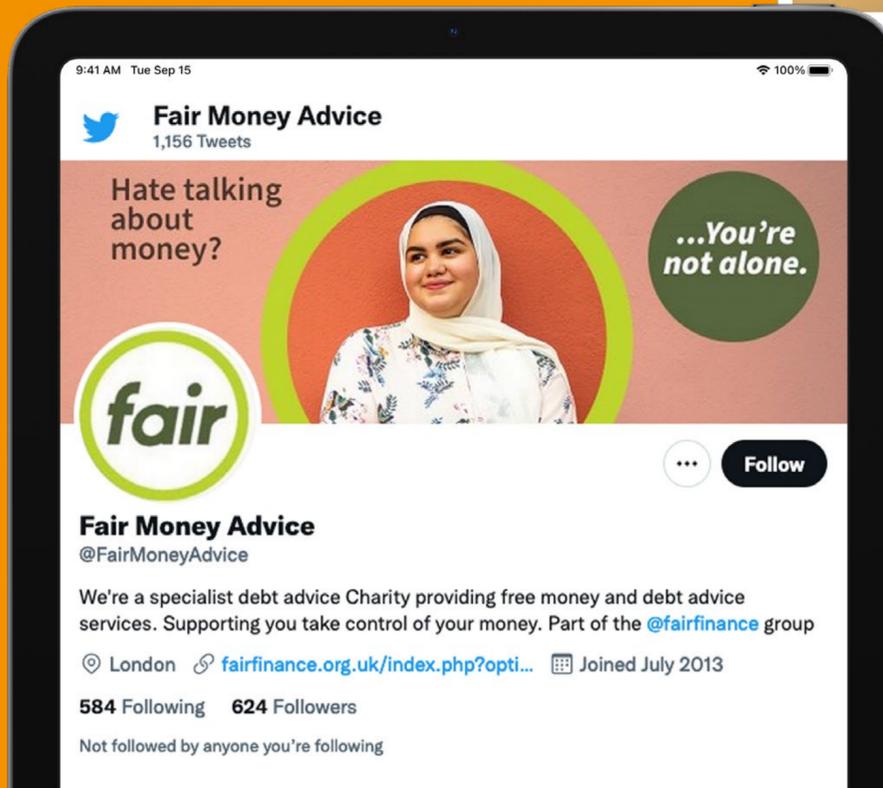
What impact has your agency had on the financial services industry in the last 18 months?

Helping the vulnerable in our industry

Each year we donate £20,000 of our time ProBono.

This year we supported Fair Money Advice, the debt advice charity, helping vulnerable and disadvantaged people gain increased access to meaningful help and support.

#forthebetter



Improving industry equality through example

To provide lasting industry change in a historically male, white industry, in 2020 and 2021 we:

- Partnered with change-making organisation 'From BAME to Boardroom', creating an agenda for change all employees contributed to
- Created an influential client and agency LGBTQ+ network to encourage more balanced depiction of minorities in FS communications

We've been shortlisted in two categories in the FTAdviser Diversity in Finance awards 2021, including Diversity Champion of the Year



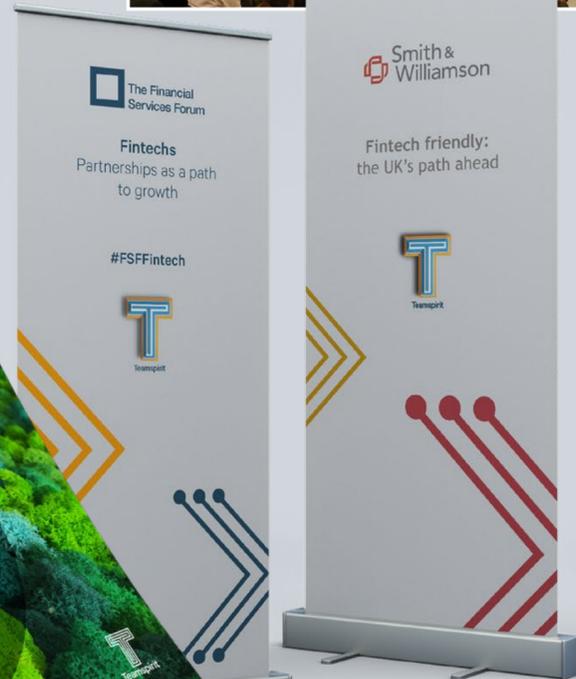
Releasing the Power of Difference for Remarkable Results



Q4 The Financial Services Industry

Thought leadership

- We partner with the FSF in a calendar of FinTech events that share innovation and transferable learnings from this sector
- To improve industry best practice we have initiated a partnership with the IOD's FS division and co-host all-member events
- To influence fairness and good governance in FS we have authored influential industry whitepapers on subjects including 'How the FS industry can build back better' and ESG



Recognized in more awards for driving industry innovation and marketing effectiveness than any other FS agency.

In the past 12 months our work has been recognised in 14 award wins, including:

- 2 international Marcoms awards
- 3 Investment Week Innovation awards
- 4 FSF Marketing Effectiveness Awards (including Judges' Award for Marketing Excellence)
- 3 Agency of the Year awards