

Analysis

Team Crawford

Lauren Buie, Ava Glassen, Marisa Gu,
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Analysis



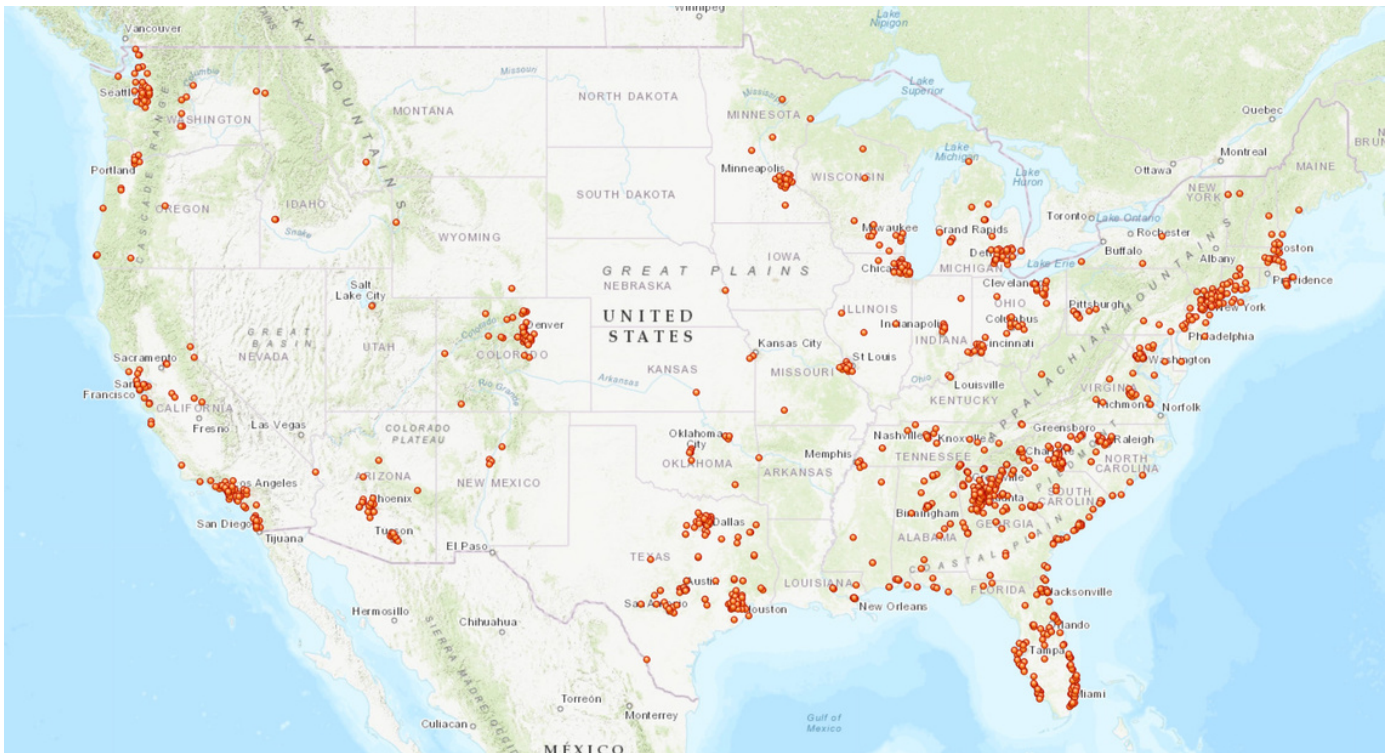
Analysis

Geographic Mapping
HubSpot Analysis

Analysis

Geographic Mapping

With provided demographic data about Crawford's clients, we were able to map out individual investors' locations. Using ArcGIS, over 900 clients' zip codes were inputted and mapped within the program. Each pin on the map represents the location of one of Crawford's clients. Analysis of the geographic data can reveal information about locations where most Crawford clients primarily reside and offer opportunities for expansion. We researched the wealthiest cities in the US and compared them to the locations of Crawford's current client base. Fortunately, Crawford has a presence in all of the top 10 wealthiest US cities. We noticed that four of these top 10 wealthiest cities have a relatively low number of Crawford clients: Washington, D.C., Boston, MA, Princeton/Trenton, NJ, and San Jose, CA. There is an opportunity to expand in these cities as they contain ideal targets. Future marketing and communication strategies can be targeted in these cities to attract potential clients from our target audience.



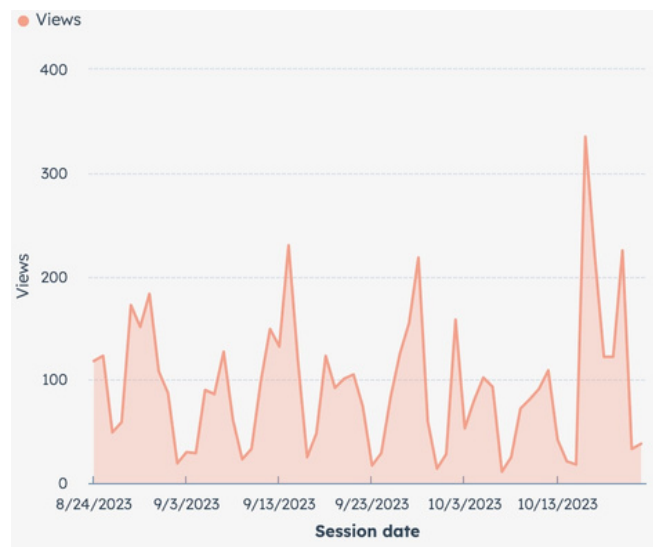
10 Wealthiest US Cities	Crawford has Presence (Y/N)
Washington, D.C.	Y (4)
Boulder, C.O.	Y (10+)
NYC/Newark/Jersey City	Y (10+)
Bridgeport/Nowark, C.T.	Y (5)
Boston/Cambridge, M.A.	Y (3)
Trenton/Princeton, NJ	Y (3)
Seattle/Tacoma, WA	Y (10+)
San Fran/Berkeley, CA	Y (10+)
San Jose, CA	Y (3)

Analysis

HubSpot Analysis

Visitor Activities

We were given access to HubSpot to analyze data from the backend of the website and to make recommendations based on our analysis. We looked at several key metrics on HubSpot to help inform our suggestions. First, we looked at landing page visits. The Individual Investors homepage is viewed most frequently by website users. This means that our website redesign will be put to good use on a page that sees many visitors. Other popular pages are the Investment Philosophy page and the Our Team page. We also analyzed the average time spent on each webpage. Overwhelmingly, the Our Team page, which introduces all members of the Crawford team, averaged the highest time spent by users. This indicates that users are interested in learning more about the people who will be managing their portfolios. Crawford can continue to set itself apart by emphasizing its personal relationships. We also noted that Disclosures and A Message from the Founder had the lowest average time spent at 3 minutes. Lastly, we analyzed the time of day/week/month that users were accessing Crawford's website. Overall, the site sees more visitors at the close of each fiscal quarter. We can infer that people are looking ahead to the next quarter and may be looking for financial improvement opportunities and support as they analyze their earnings from the previous quarter. The website also sees more viewers towards the beginning of each week, as shown in the graph. Viewership trails off toward Fridays and picks back up again on Mondays as potential clients gear up for the week and consider finding financial support as a client.



Pages

We also analyzed pages on Crawford's website to gain insight into content topics. The most popular topics are educational blog posts discussing dividend stocks. Second to those are unique articles that describe the Crawford strategy in depth. It is also important to note that the most popular articles were written by Crawford's founder, John Crawford, III. We also analyzed a correlation between market conditions and website visitors. On several occasions when the stock market saw a drop, such as in September 2022, the Crawford website had a spike of approximately 300 visitors. This shows that as the stock market experiences volatility, people begin looking for opportunities to educate themselves about Crawford and its services.

Strategy

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Strategy

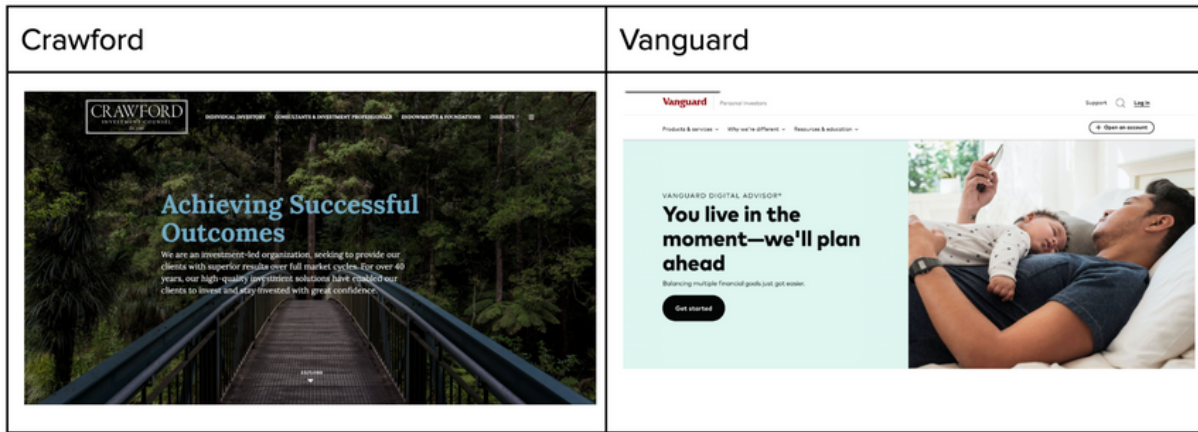
Best Practices
ALMNAC Framework
Perpetual Accumulation

Strategy

Best Practices

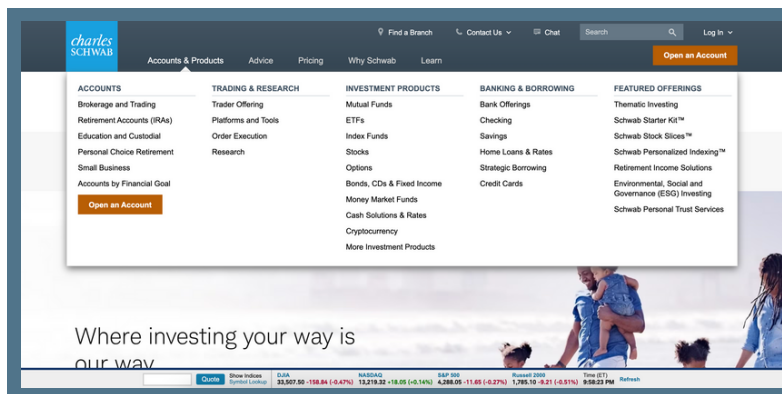
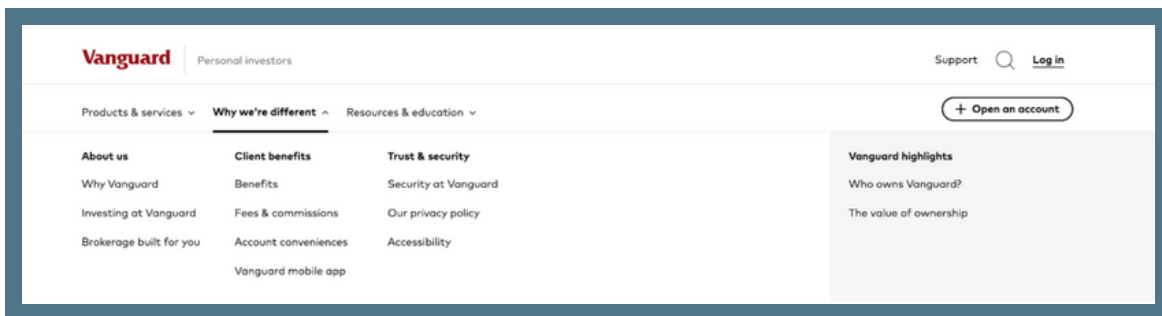
1 Landing Page

Crawford’s competitors include a more personal photo when you first click on the website. This helps to draw users in and relate to the content they are about to consume. The landing page also features a catchy tagline that involves the potential client. Including phrasing such as “you” and “us” adds humanity to the company.



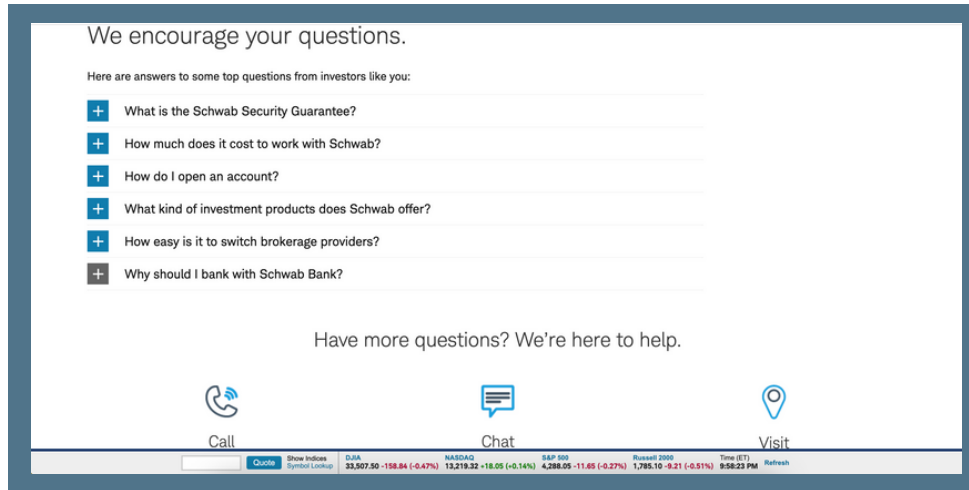
2 Navigation Bar

We enjoyed the three sections separating About Us, Client Benefits, and Trust & Security that Vanguard and Charles Schwab use. Since Crawford repeats a lot of the information for their three client pools, they could do something similar to this navigation bar shown below. In general, it’s good practice to create a well-organized and easily accessible navigation bar.



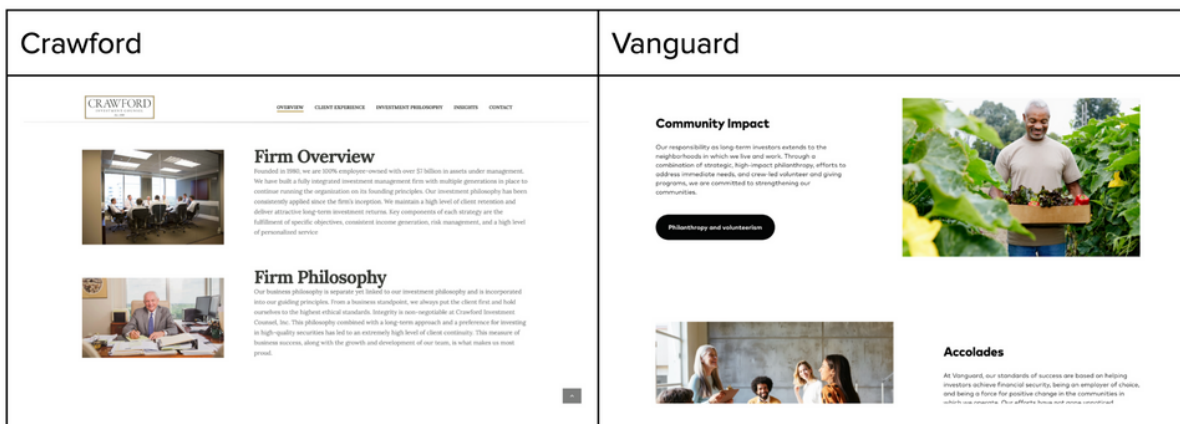
3 FAQ Page

A FAQ page is missing from Crawford's website and we believe it would help clients to identify if they meet the minimum requirements and why they should choose Crawford. It could also be a resource to answer commonly asked questions that may come up when searching for an investment firm.



4 Firm Overview

We recommend simplifying text and inserting more relatable images. This page is an opportunity to win over clients so we believe it should be where most of the compelling content is. Engaging fonts, icons, and smaller text blurbs could be beneficial in these areas.



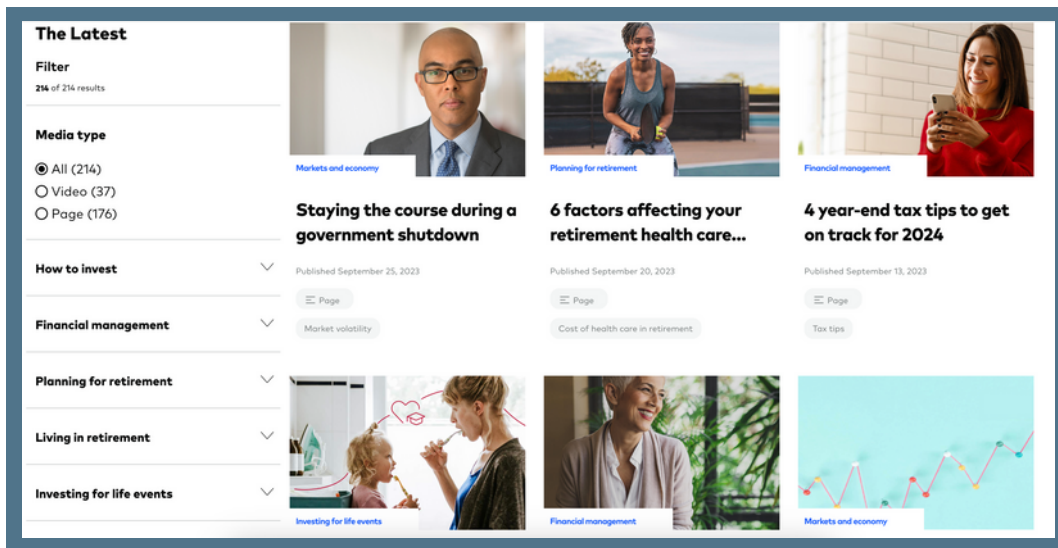
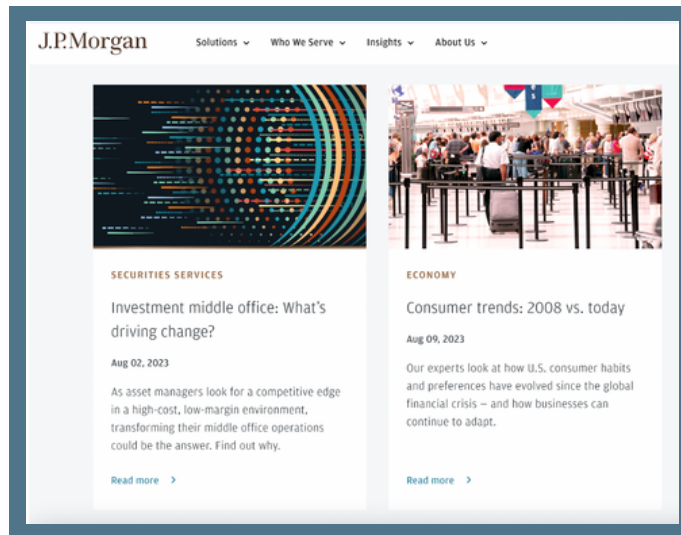
5 Visuals

Again, icons are great, but there is too much text. Crawford's informational pages hardly have any visuals and the long paragraphs appear overwhelming at first glance. Breaking up large text sections with icons and imagery could help make the website more visually appealing and easier to read overall.

Crawford	Vanguard
<p>Time-Tested, Consistently-Applied Investment Philosophy</p> <p>Crawford was founded on the trust of a single non-profit client with a mandate for both growth and income. Over 40 years, we have maintained the belief that meeting high-quality, income-producing securities gives endowments and foundations the greatest chance of success.</p> <p>Investing for the Greatest Chances of Success</p> <p>We Call It a Common-Sense Approach to Investment Management</p> <ul style="list-style-type: none"> Investing in individual high-quality, income-producing securities expands the range of potential investment outcomes. This in turn mitigates the likelihood of premature loss of capital and enhances the pattern of returns. Consolidating assets under our management enables a single, transparent layer of fees. <p>Steady Income + Upside Growth + Downside Protection = Successful Outcomes</p> <p>Contributors to Your Organization's Success</p> <ul style="list-style-type: none"> Confidence in meeting high-quality, individual securities. Enabling the benefits of income and growth of income with a high level of risk management. 	<p>A plan and portfolio built around your goals</p> <ul style="list-style-type: none"> Personalized planning Partner with an advisor to build a strategy based on what's important to you—whether that's paying off debt, early retirement or saving for a purchase. Holistic view Manage all of your banking, investing and borrowing, and conveniently transfer money in the Chase Mobile app or at chase.com. Invest your way Whether you're new to investing or have years of experience, we have advisors to support you as your financial needs evolve over time. Trusted expertise Our advisors use J.P. Morgan's market research and investment expertise to help you navigate every milestone and opportunity. <p>Ongoing support We'll monitor your investments and rebalance your portfolio as needed.</p> <p>Low-cost investing For all-index investment options, you'll pay no more than \$2 a year for every \$1,000 Digital Advisor manages.²</p> <p>Potential tax reduction** Take advantage of our free tax-loss harvesting service to help reduce your tax bill and keep more of your returns.</p>
<p>Integrity At Crawford Investment Counsel, Inc., being independent, honest, and always putting our clients first is a non-negotiable and guiding moral compass. In the face of the challenges in integrity, we are committed to providing every single investment decision to the absolute best of our ability, being with the best client and remaining loyal to the business to practically add to our clients' wealth, through the due diligence and honest assessment of what is working, what strategies have been used, and being available about expectations and when we can be added.</p> <p>Continuity We seek long-term relationships with our clients, and we will always remain committed to their success. We are proud to provide our clients with professional support from the same dedicated individuals year after year. The employees we've hired, we have maintained a strong commitment of continued leadership. Further, regarding our commitment to continuity, the formula for continuity is professional and a consistent work environment for all.</p> <p>Quality Our investment philosophy focuses on value. Investment clients' financial portfolios and risk management for high-quality investments. We seek to build a consistent business through a consistent quality and the highest research process in order to meet the goals and objectives of our investors.</p> <p>Service The goal is to respond to the needs of our clients in a manner that respects our appreciation and respect for them. We do this by providing individualized, personal service from exceptional professionals who are committed to competence, quality, responsiveness, and consistent reporting that about investment record to equity and which we are committed to the highest level of service.</p> <p>Discretion We take client confidentiality very seriously and value our clients' privacy. We strive to safeguard sensitive information confidential and adhere to a strict privacy policy.</p> <p>Independence Our goal is to serve you as close as we can to the heart of your business. Being independent allows us to work towards the ultimate goal of our clients and to provide the single best way to ensure the consistent alignment of the interests of our firm and our investors.</p>	

6 Content Filtering

We believe that the content filtering system could be redesigned to help users as they navigate the website's contents. Even if the template does not allow for filtering, you could add something to the image to easily identify the insight. Also including a blurb that summarizes the article below the title will help readers preview content and could help to increase engagement on the insights.



7 History/Culture Page

Adding a timeline to show how far Crawford Investment Counsel has come would be beneficial for the brand and for potential clients to see what the firm has accomplished. This page could also be a way to outline achievements and awards won over the years. It could also be an opportunity to emphasize the family-owned values that Crawford is so proud of.

Strategy

ALMNAC Framework

Ads (Traffic) → Landing Page → Magnet (Guide) → Nurture → Appointment = Client

Recap of ALMNAC

ALMNAC is an advertising strategy used by Fisher Investments, one of Crawford's competitors, to attract new clients. This approach involves creating ads to generate traffic to a landing page featuring downloadable guides acting as a magnet. Prospects are then nurtured, which ultimately leads to a consultation appointment, thus converting the prospect into a client. The goal is to sell the value of a low commitment next step rather than their services straight away.

How can Crawford implement ALMNAC?

Crawford can utilize this advertising strategy to attract prospective clients by promoting their podcasts/perspectives, presenting them as an insightful resource that aids potential clients in achieving their income needs and long-term growth goals.

The ads can be placed on webpages specifically targeted for their client demographic (e.g., Fox News, Forbes, WSJ, MarketWatch). The design should feature a benefit/problem-oriented headline, a concise explanation, and a clear call to action. Furthermore, the ad must utilize benefit-oriented language, such as "free guide," incorporate social proof, e.g., "over 1.3 million viewers," and emphasize the potential value, such as "from a \$7.5 billion investment management firm's perspective."

Crawford would then be able to identify prospective client needs by analyzing the type of ad they clicked on. For instance, the perspective titled "[How's My Portfolio Doing?](#)" suggests the client's concern about their long-term portfolio value.

Once the client clicks on the ad, the link will take them to a landing page where they can access the content in exchange for their phone number and email address. Additionally, a pop-up could ask a quick survey question to help the client self-qualify for Crawford's services, thus reducing time spent with non-qualified prospects.

If Crawford determines the client as a qualified prospect, they can use follow-up methods, such as phone calls or emails, to provide information about the services offered, such as portfolio reviews and financial planning. These initiatives can help contribute to a positive impression of Crawford as a reputable firm.

Strategy

Perpetual Accumulation Registered Trademark

Benefits of a Registered Trademark

Since the Perpetual Accumulation™ approach was formulated by Crawford's proprietary in-house research, registering a trademark will reaffirm Crawford as an expert in the field.

Redesigned Perpetual Accumulation Graphic

The new graphic includes Crawford's brand colors and simplifies the text to easily convey the message of creating lasting wealth through Crawford's unique investment strategy.

Original Perpetual Accumulation Graphic



Redesigned Perpetual Accumulation Graphic

