Exploratory Research

Team Crawford

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New Media Capstone
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CRAWFORD
INVESTMENT COUNSEL

40 YEARS OF SERVICE

Primer

Crawford Investment Counsel is an independent investment management firm that was first established in 1980 by **John H. Crawford, III**. The firm focuses on building high-quality investment portfolios of stocks & bonds for three different business channels: Individual Investors of High Net Worth, Consultants & Investment Professionals, and Endowments & Foundations.

While Crawford is still considered small in terms of employees, the firm currently manages a substantial $7 billion in assets, with 60% of that amount deriving from individual investors who make up the majority of their clientele. To further enhance their overall success and reputation, Crawford aims to attract 100 new individual (HNWI) clients through organic and word-of-mouth referrals with the research of this project.

INVESTMENT ADVISER

John Crawford III

Crawford Investment Counsel Inc.
Founder, chairman and chief investment officer

Education: Bachelor's degree from The University of Georgia; master's of divinity from Drew University

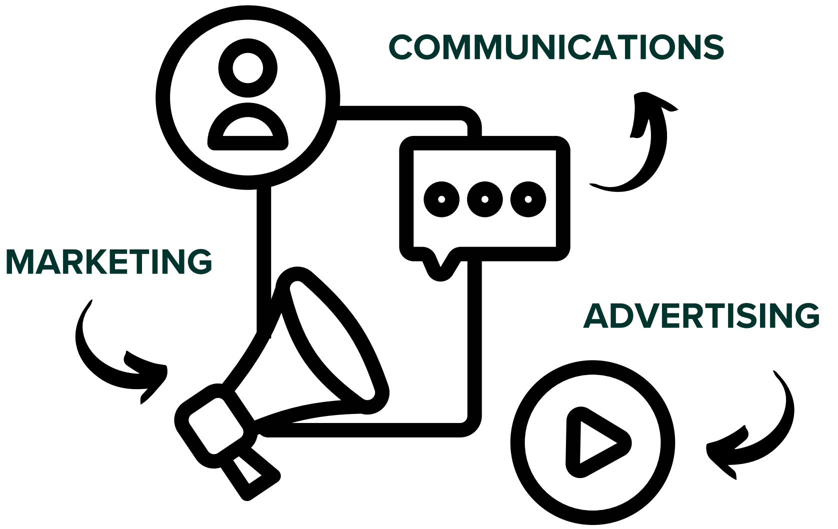
Target Audience

- **High-Net-Worth Individuals** (HNWI)
- **Minimum Investable Assets:** $2 Million

Crawford's target audience are high-net-worth individuals (HNWI) who have investable assets worth a minimum of $2 million.

Most of these people are individuals nearing or in retirement who are around the ages of 60 to 75. Our target audience also includes people who are friends of current investors with Crawford since those word-of-mouth referrals will generate the highest profit for the company.

Inspiration



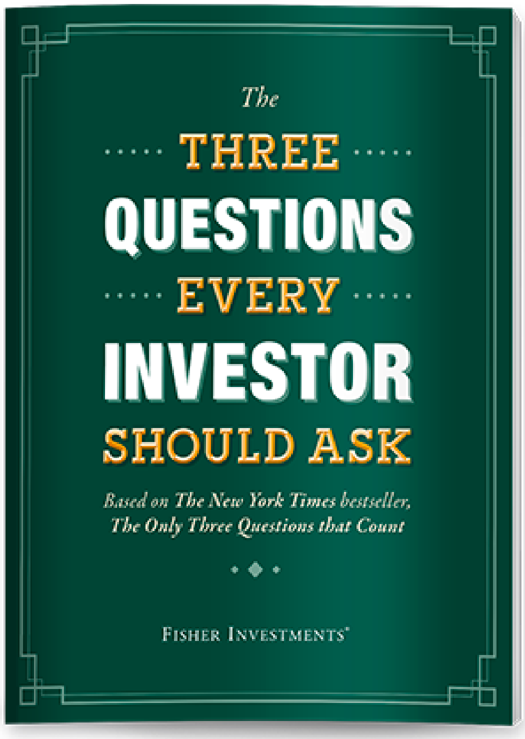
Our main inspiration for this project is **Fisher Investments**, who our client named as a notable competitor in regards to **marketing**, **communications**, and **advertisements**. Their strong reputation for personalized investment portfolios and financial advice for a very large client base is attributed to their wide range of services.

Fisher's marketing and communication efforts are closely connected through their use of **online tools/resources** (i.e. financial calculators, guidebooks, educational videos) and their unique method of connecting with clients via "**High-Touch Services**."

Fisher first identifies customer needs with advertisements of available tools and downloadable resources in exchange for their phone number and email address.

Then, they employ their follow-up method, which includes up to four weekly phone calls and follow-up emails with an informational list of options to explain the services offered (i.e. portfolio review, financial planning, information on their views on the financial markets). These strong efforts thus leave prospects with an impression of Fisher being a credible firm.

ALMNAC

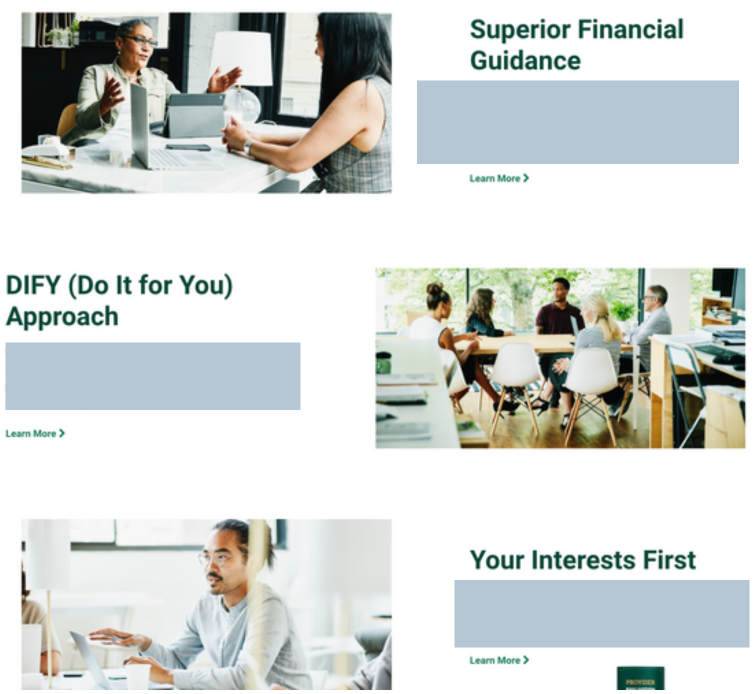


Ads (Traffic) → **L**anding Page → **M**agnet (Guide) → **N**urture → **A**ppointment = **C**lient

Additionally, Fisher Investments utilizes a distinctive advertising strategy with the formula ALMANC. 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 of this method is to sell the value of a low commitment step rather than the services they offer straight away.

Navigation Bar

Since we plan to restructure and redesign the website as one of our final deliverables, we also looked at Fisher's website to inform our thinking for Crawford's website. In general, Fisher's text and colors are easily distinguishable and bold enough to make reading easier for users.

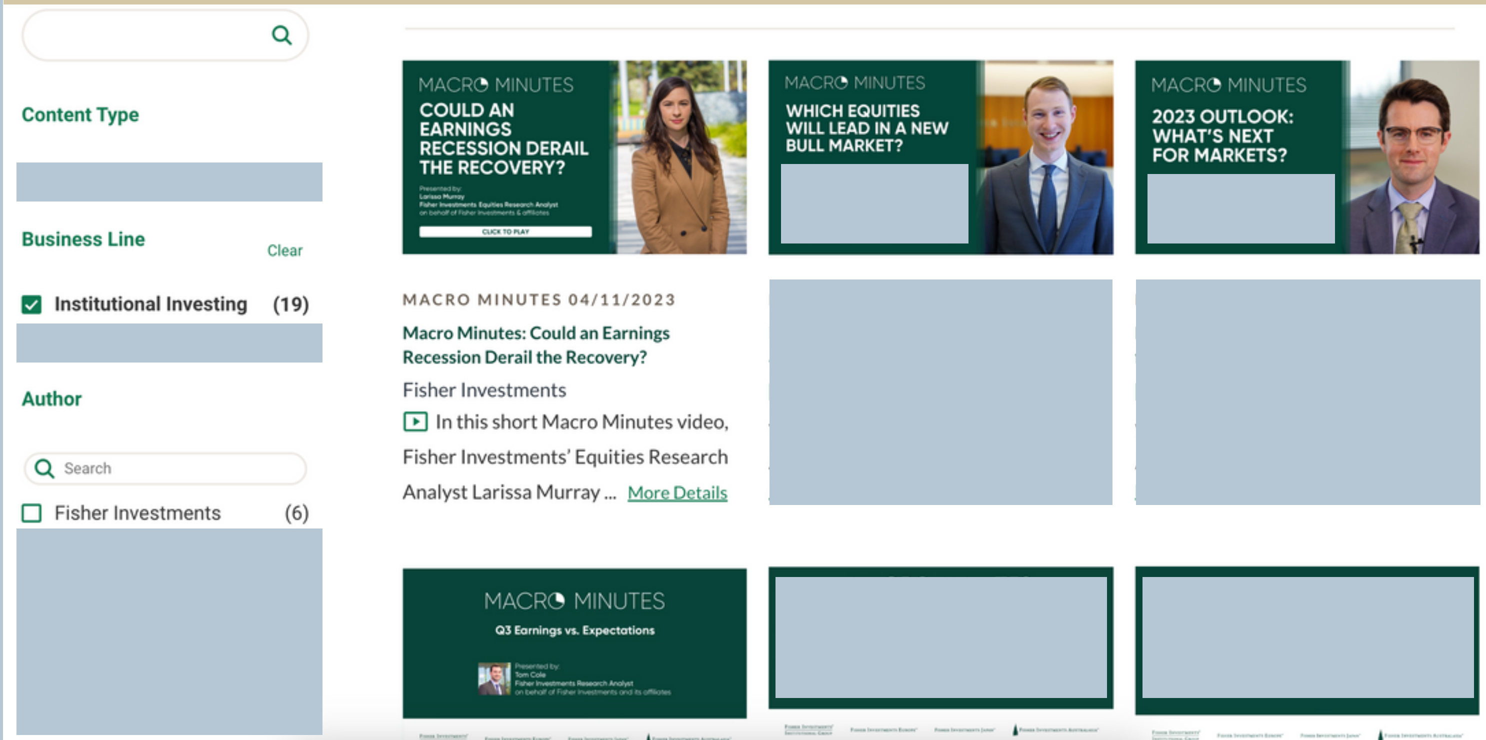


Readability & Photos

There is also a wide usage of photos that feel more natural and relevant to the content. The first thing we noted was that the navigation bar was more intuitive and easily accessible, even though there's more information in the sub-tabs. Fisher does a great job breaking down this information with a clean layout as well as icons and headers to further organize.

Crawford has three "separate" websites to differentiate pools of users, however, we believe this affects usability. Fisher's website breaks these different groups within the main navigation bar of the site. The website also offers an abundance of information that users are able to navigate themselves and draw from. While a lot of information is offered, it feels more manageable to understand.

Insights Organization & Clear Information



Fisher also offers more resources for all users to utilize. The organization of content labeled under insights is much more user-friendly as it is easily searchable or filtered and also includes a short preview of each article. Fisher also explicitly breaks down how their firm works and differentiates itself from other firms. This can benefit prospective clients by clearly laying out important information that factors into their choice of investment firm.

How We're Different