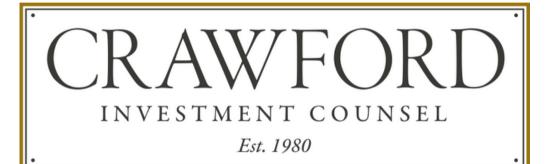
Project Plan



Team Crawford

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> New Media Capstone September 12, 2023

Client Introduction



Company Overview

History and Current Strategies

- We have been around since 1980 & the firm's founder is still with Crawford today
- Crawford has maintained a consistent investment philosophy focused on high-quality investments for over 40 years
- The firm has grown to over \$7B in assets under management & over 50 employees over its four decades of history
- Crawford's current "marketing plan" is to produce the most effective communications as possible to define our value-add with our clients (to promote retention & referrals) & to the marketplace (to bring in new clients)
- Communications at Crawford include: the website, our "Insights," prospect proposal materials, client reporting/presentations, events, and one-off communications
 - Insights include: articles (we call them "Perspectives"), Podcasts, Economic & Market Updates, & Quarterly Letters
- 100% of our revenue comes from fees we charge our clients for our investment management services

Crawford Identity

- Achieving successful outcomes
- Common-sense
- Client-first mentality
- Consistency
- Dividends
- Employee ownership
- Enabling clients to invest with confidence
- Enabling clients to "sleep well at night"
- Fundamental bottom-up research
- Generating alpha
- Independence
- Income

- Investment-led
- Narrowing the range of outcomes
- Objectives-based investing
- Old school
- Philosophy-driven
- Predictability
- Proprietary investment strategies
- Quality in everything we do
- Respect
- Service-oriented
- Simple but elegant
- Value-added

Project Overview

Project Summary

Our Project

 Our project involves tech and media consulting for an investment firm known as Crawford Investment Counsel (CIC). Our plan is to increase the usability of Crawford's website and establish a marketing plan to help attract clients, specifically individuals through word-of-mouth referrals.

Client Goals

- Crawford Investment Counsel is looking to bring in 100 new clients, preferably high-net-worth individuals through word-of-mouth marketing
- Crawford's target market is:
 - Clients further along in their life/career (near or in retirement) with a larger accumulation of wealth
 - Clients who are looking for realistic outcomes and not looking for exclusively high market returns with higher risks
 - Clients that are long-term, perhaps even generational

Final Deliverables



Deliverables

Website

- Improving usability and navigation based on UX research (ex. Navigation bar and 3 pools of users)
- Confining copy
- Bolstering brand narrative/focus on storytelling
- Better highlighting content such as the Perspectives and Podcast
- Working on Perspectives and Podcast

Introductory/Proposal Materials

- Research if current methods and materials are helpful for referring and choosing Crawford
- Potential redesign of collateral

Referral Methods

- Events
- Researching the best places to target and reach HNWI

Client Tracking

- Formalizing data collection
 - Potential use of Salesforce
 - Website tracking
 - Feedback from clients such as their client experience and preference for Crawford
 - Recruiting statistics
 - Better understanding of client backgrounds

Potential Challenges & Solutions

Challenge

Our team is less knowledgeable about the finance industry and the client's target audience.

Solution

Our group can engage in outside sources such as subscribing to a finance newsletter and easyto-digest finance podcasts to better understand our client and their target audience.

Challenge

Client's expectation with final deliverables is somewhat unknown.

Solution

We can generate an open conversation with our client about their expectations for us regarding specific deliverables we can create. We must be willing to receive constructive feedback and adapt based on what our client wants from us.

Challenge

Tracking word-of-mouth referrals

Solution

We can create a form where every new client must come in and fill out where they heard of Crawford at the very first consultation which could help gather this data.

Challenge

Create relevant marketing materials for a niche target audience that may be hard to reach.

Solution

We can dive into extensive research about our target market to fully understand what strategies work best for them. We can evaluate what Crawford has done to reach their target market in the past. We can test out a mix of different strategies to see what our client thinks will work best since they know their target audience the best.

Challenge

Redesigning current website and collateral without knowing the most pertinent information that needs to be presented on these platforms.

Solution

We can have in-depth meetings with our client where she goes over exactly what she wants on each deliverable so there are no miscommunication with what the actual copy should be.

Goals

REACH

- Bring in 100 new clients, specifically high networth indidivuals through wordof-mouth marketing
- Better communication with clients and increase their positive experiences with Crawford
- Fleshed out Figma prototype of Crawford's website
- Full plans for event/sponsorhip execution
- Brand new introductory/proposal materials created for Crawford

MAIN

- Conduct research, based on the market and clients, to strategize the best plan to bring in new high networth clients through word-of-mouth marketing (ex. events)
- Learn more about Crawford and the finance/investment industry in order to address client goals
- Surveying and tracking Crawford clients to learn about their experiences and background with the company and find out how they are interacting with the website
- Research and suggestions for introductory/proposal materials

SAFETY

- Brainstorm and suggest ideas to help better website usability and increase online resources/content for all clients
- Work on suggestions for Perspectives and the Podcast
- Conduct research and offer a basic marketing plan

08/24	24 CHECKPOINT 1 KICKOFF				
·		Review Introductory Crawford m weekly meeting time	aterials, Decided outside of cla	ISS	
08/25		Initial Introductory email sent to Crawford			
08/27		Review and summarize Introduct	tory Crawford materials		
08/29		Review Cameron's Email, Draft and send response, Draft Team Role Contracts			
08/31		Assigned exploratory research to	opics, Team headshots		
09/05		Reviewed exploratory research topics, Created agenda for meeting with Portfolio Manager			
09/07		Meeting with Portfolio Manager and Cameron, Work on Checkpoint 1 deliverables			
09/11		Regroup on deliverables, Practice presentation, Review materials from Crawford, Summarize and Research			
09/12		CHECKPOINT 1 DUE			
·		Presentation			
		Directly Responsible Individual			
		Alpha - Ava Glassen	Project Plan - Deborah Yoon PR/FAQ - Lauren Buie		

