

# Project Plan



## **Team Crawford**

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New Media Capstone  
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# 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 easy-to-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 individuals through word-of-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/sponsorship 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

# PROJECT

## TIMELINE

- 08/24 ● CHECKPOINT 1 KICKOFF  
Review Introductory Crawford materials, Decided outside of class weekly meeting time
- 08/25 ● Initial Introductory email sent to Crawford
- 08/27 ● Review and summarize Introductory Crawford materials
- 08/29 ● Review Cameron's Email, Draft and send response, Draft Team Role Contracts
- 08/31 ● Assigned exploratory research topics, 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

Presentation - Marisa Gu  
Alpha - Ava Glassen  
Exploratory Research - Shahla Le

Project Plan - Deborah Yoon  
PR/FAQ - Lauren Buie

# PROJECT

## TIMELINE

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- 09/14 **CHECKPOINT 2 KICKOFF**  
Meeting with Crawford to present deliverables
- 09/18 Meet and discuss Checkpoint 2 deliverables
- 09/19 Create agenda for next meeting and draft email to Cameron
- 09/21 Meeting with Crawford
- 09/25 Focus on concise explanation of Crawford and project, work on deliverables
- 09/26 Prepare for meeting with Crawford, work on deliverables
- 09/28 Meeting with Crawford
- 10/03 **CHECKPOINT 2 DUE**  
Checkpoint 2 Presentation, Peer Evaluation 1, Certificate on transcript review and certificate name confirmation

### Directly Responsible Individual

Presentation - Shahla Le  
User Research - Lauren Buie

Beta - Ava Glassen  
UX Map - Marisa Gu & Deborah Yoon



# PROJECT

## TIMELINE

- 10/05 ● CHECKPOINT 3 KICKOFF  
Meeting with Crawford and Developer
- 10/10 ● Review materials and meeting summary
- 10/12 ● Prepare for next meeting, start deliverables for Checkpoint 3
- 10/16 ● Review Brand Kit and UX designs for website beta and visual design guide
- 10/17 ● Focus on website beta and meeting agenda, start presentation
- 10/19 ● Meeting with Crawford and Developer (review brand kit and UX ideas for website)
- 10/23 ● Edit and polish deliverables, practice presentation
- 10/24 ● CHECKPOINT 3 DUE  
Checkpoint 3 Presentation, Peer Evaluation 2

### Directly Responsible Individual

Presentation - Shahla Le  
1.0 (Rough Draft) - Deborah Yoon  
Visual Design Guide + Poster -  
Marisa Gu

Website Beta - Ava Glassen  
SLAM Promotional Material -  
Lauren Buie

# PROJECT

## TIMELINE

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- 10/31 **CHECKPOINT 4 KICKOFF**  
Final deliverables, portfolio overview
  - 11/02 Meeting with Crawford
  - 11/06 Discuss Stage Presentation Beta and Launch/Handoff/Social
  - 11/07 Create meeting agenda, Parse Resume
  - 11/09 Meeting with Crawford
  - 11/13 Draft SLAM Client invite
  - 11/14 Future Fundsters, Shirt Distribution, and SLAM Rundown; SLAM client invite reminder
  - 11/16 **CHECKPOINT 4 DUE**  
Checkpoint 4 Presentation, Peer Evaluation 3

### Directly Responsible Individual

Stage Presentation Beta - Marisa Gu  
1.1 (MVP) - Shahla Le  
Resume - Ava Glassen

Launch/Handoff/Social  
Deliverables - Deborah Yoon

# PROJECT

## TIMELINE



### Directly Responsible Individual

Operational Project - Shahla Le  
Stage Presentations - Lauren Buie  
Booth Presentation + One Pager -  
Marisa Gu

Project Trailer - Ava Glassen  
Project Website - Deborah Yoon