

Marketing Strategy

Team Crawford

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Marketing Strategy



Marketing Strategy

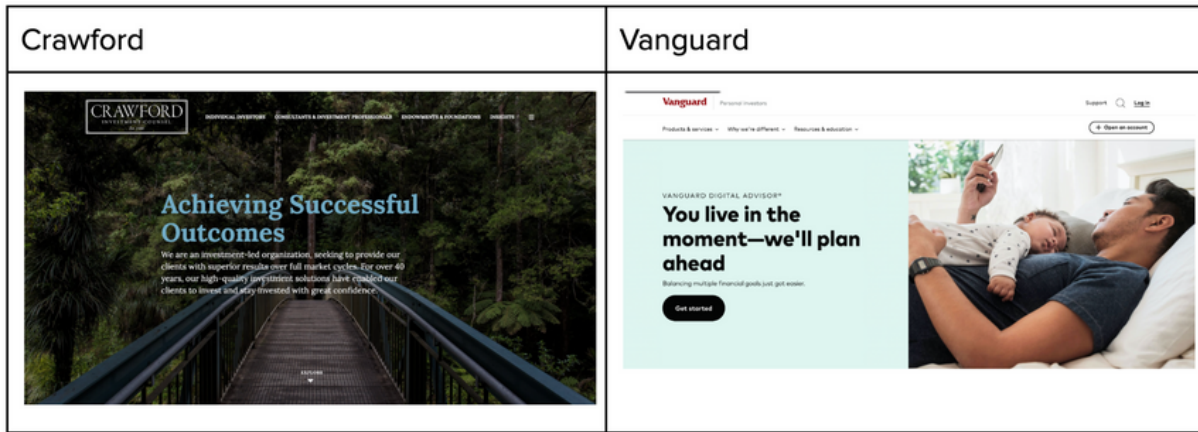
Best Practices
ALMNAC Framework
Perpetual Accumulation

Marketing Strategy

Best Practices

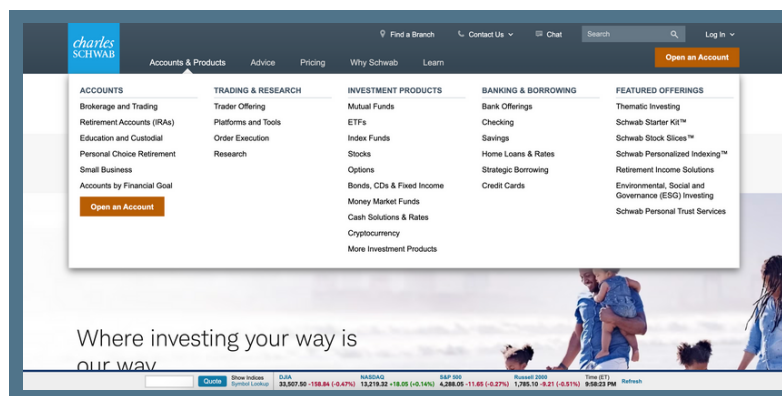
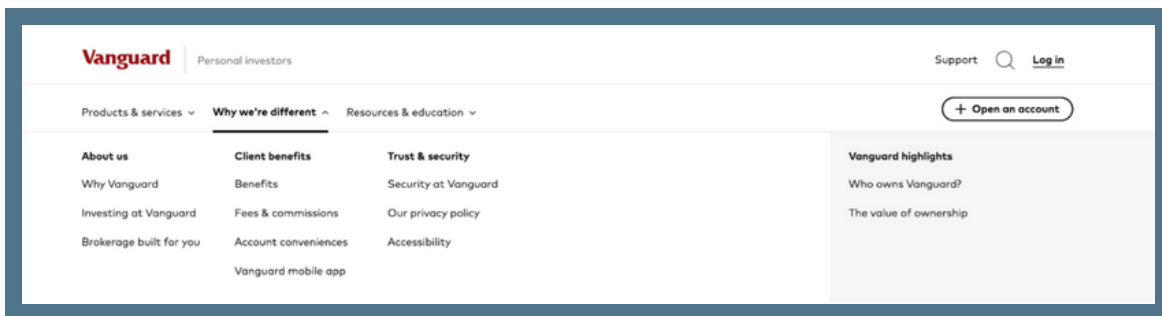
1 Landing Page

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

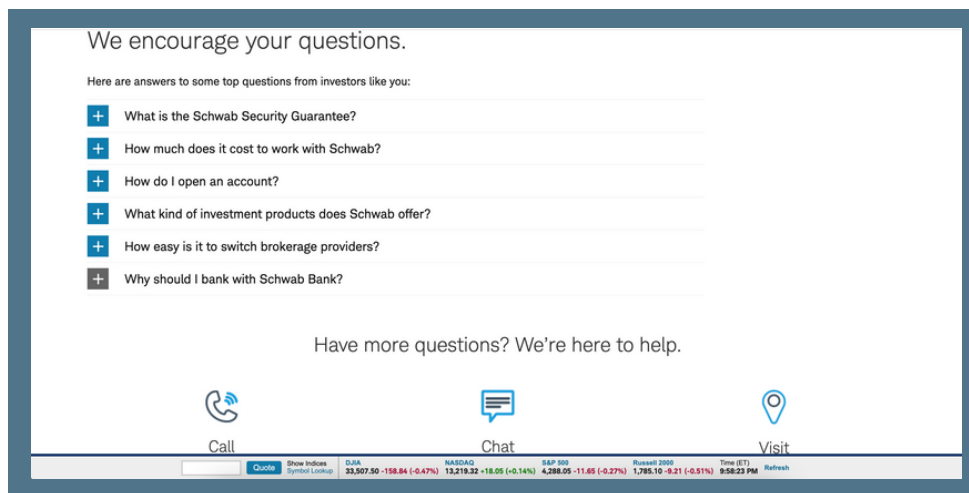
We enjoyed the three sections separating About Us, Client Benefits, and Trust & Security that Vanguard and Charles Schwab use. Since Crawford repeats a lot of the information for their three client pools, they could do something similar to this navigation bar shown below. In general, it's good practice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



Marketing Strategy

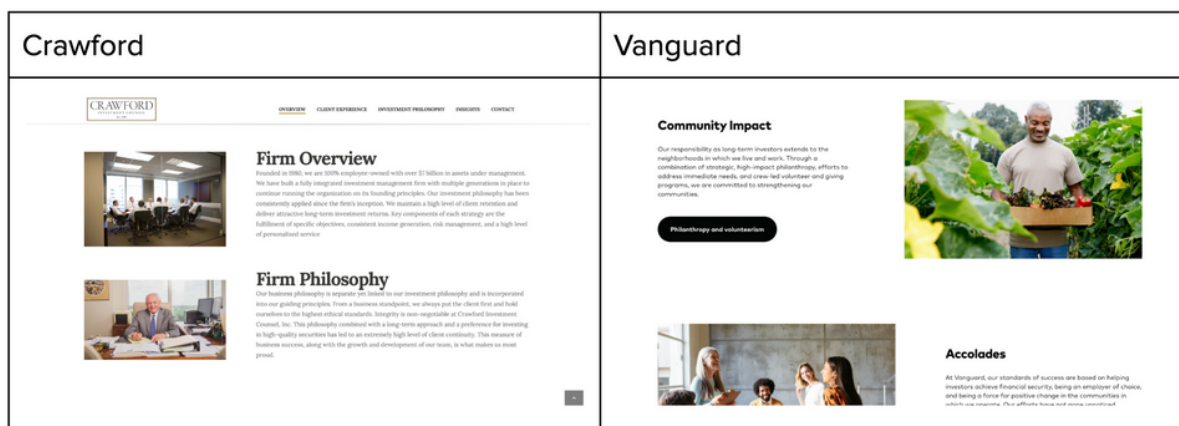
3 FAQ Page

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.




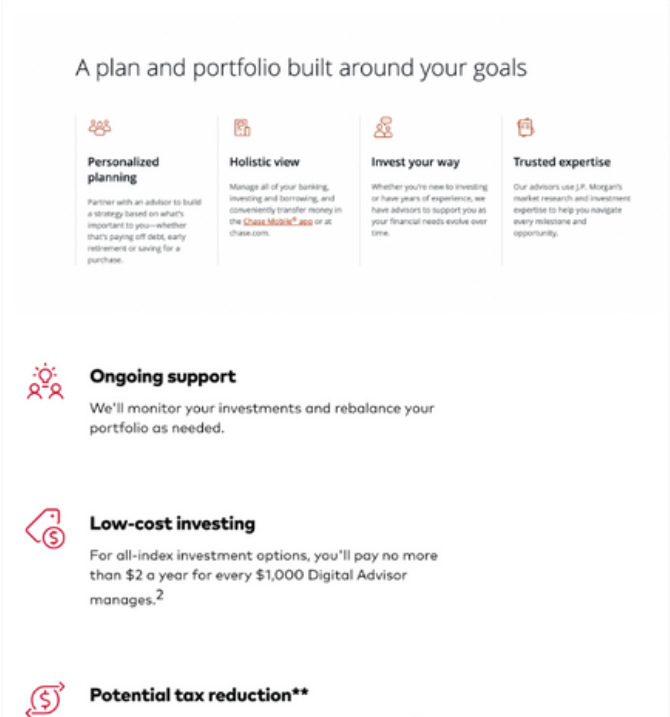
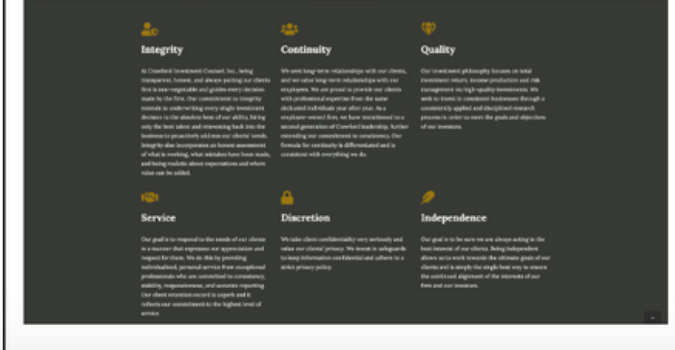
4 Firm Overview

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

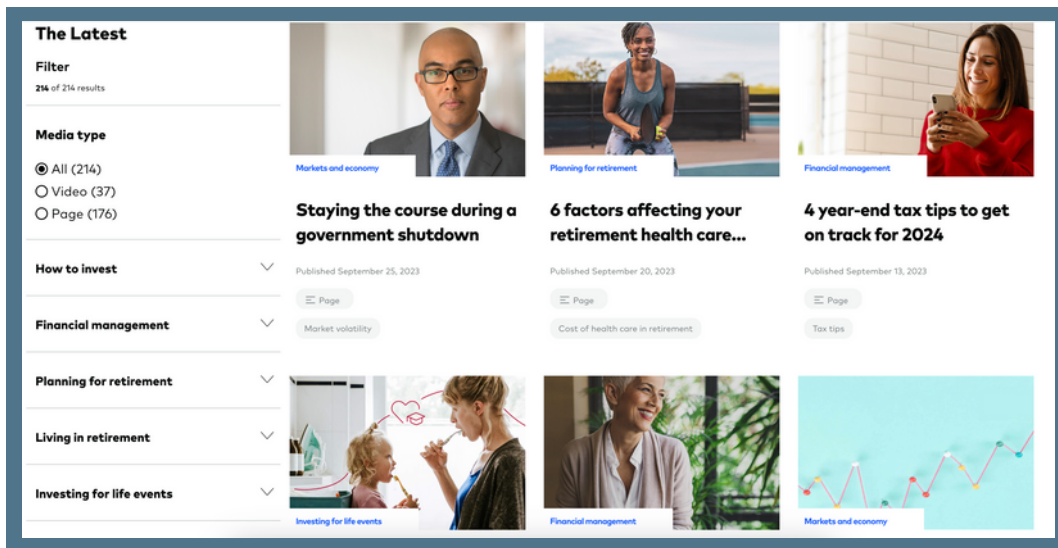
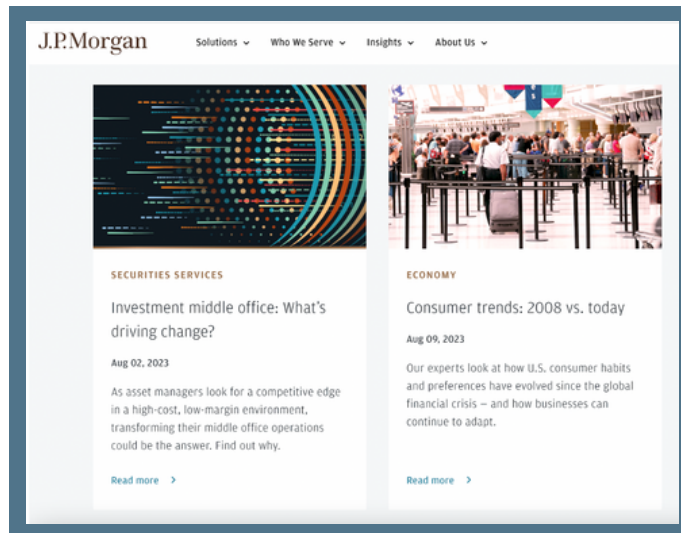
Again, icons are great, but there is too much text. Crawford's informational pages hardly have any visuals and the long paragraphs appear overwhelming at first glance. Breaking up large text sections with icons and imagery could help make the website more visually appealing and easier to read overall.

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 reduces 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.Enjoying 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</p> <p>We'll monitor your investments and rebalance your portfolio as needed.</p> <p>Low-cost investing</p> <p>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**</p> <p>Take advantage of our free tax-loss harvesting service to help reduce your tax bill and keep more of your returns.</p>
 <p>Integrity</p> <p>In Crawford Investment Counsel, Inc., being transparent, honest, and always putting our clients first is a non-negotiable and guiding moral compass. From the first, the commitment to integrity means to continue to bring every single investment decision to the absolute best of our ability, bring you the most value and returning back into the business to practically add into our clients' needs, through the due diligence and honest assessment of what is working, what strategies have been used, and being visible about expectations and when they can be added.</p> <p>Continuity</p> <p>We seek long-term relationships with our clients, and we will bring you solutions to solve their challenges. We will go to great lengths to ensure our clients with confidence and support from the same old hand and that you, after you, the employee we've hired, we have experienced the second generation of Crawford leadership. Further, regarding our commitment to continuity, the formula for continuity is differentiated and is consistent with everything we do.</p> <p>Quality</p> <p>Our investment philosophy focuses on total investment return, beyond just returns and risk management. We seek to invest in companies that have a track record of high-quality performance. We seek to invest in companies that have a track record of high-quality performance. We seek to invest in companies that have a track record of high-quality performance.</p> <p>Service</p> <p>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 explain and identify our commitment to the highest level of service.</p> <p>Discretion</p> <p>We take client confidentiality very seriously and value our clients' privacy. We strive to safeguard sensitive information confidentially and adhere to a strict privacy policy.</p> <p>Independence</p> <p>The goal is to serve our clients with the best interest of our clients. Being independent allows us to work towards the ultimate goal of our clients and to bring the single best way to ensure the consistent alignment of the interests of our firm and our investors.</p>	

Marketing Strategy

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.

Marketing 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.

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Perpetual Accumulation Registered Trademark

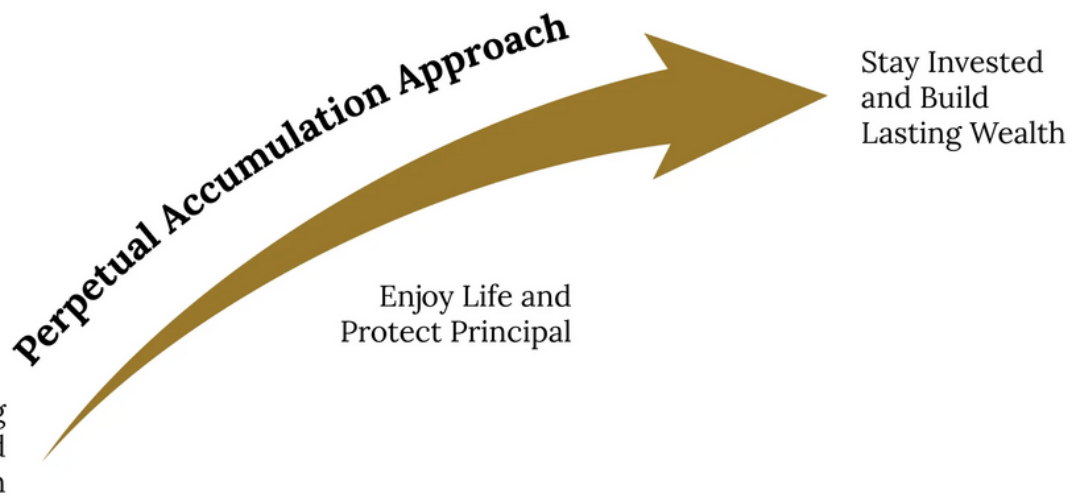
Benefits of a Registered Trademark

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

