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# *Living Ratings*

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THE DIGITAL INTELLIGENCE OF THE WORLD'S  
LEADING ASSET MANAGERS 2017



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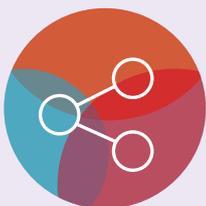
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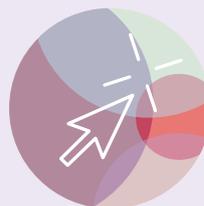
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## Section 1

# Introduction

*In 2016 our previous analysis of asset managers' digital intelligence revealed that just 8% of the top 100 firms provided exceptional digital content and engaging functionality for financial advisers and intermediaries (FAIs).*



**Kate Shaw,**  
Co-founder and  
Chief Executive Officer

July 2017

**Twelve months on and that figure is just 11%, a disappointing performance from a sector that should have communication at the heart of their digital strategy.**

There's a hard-wired view among many in the asset management arena that positive financial performance somehow negates the need for quality communications. There also appears to be a distinct lack of strategy across targeted content, social media and functionality, leading to only a handful of asset managers demonstrating that they have thought about their target audience. Whatever the reasons, our ratings tell their own story; that apart from the leading firms in our study, too many asset managers are neglecting their FAI audience with sub-optimal and undifferentiated digital communications.

### **Focus on the audience not the firm**

This is the asset managers' #1 communications priority. Audience focus is the single biggest driver of successful digital communication. By focusing on their FAI audience asset managers can enhance access to their firms and ease the selection process. Conversely, by failing to engage them, asset managers are missing a valuable opportunity to smooth the investment decision-making process and build enduring relationships that can weather the cyclical and inherent volatilities in the market.

### **Content matters**

Where once the asset management sector was a digital desert, websites and social media channels abound. Whilst this represents genuine progress, the content and functionality within them leaves a lot to be desired in most cases. Quality search functionality is hard to find, websites resemble glorified CVs and blogs read like technical manuals.

As for thought leadership, well there's little thought and no leadership. Social media, especially Twitter and LinkedIn, are swamped with relentless HR tweets and duplicate updates. It's clear that asset managers are missing an opportunity to create content that resonates with FAIs and can build lasting two-way relationships.

Over the following pages we present our findings in detail and take a closer look at the digital successes and failures within the world's leading asset managers. We hope you find it helpful and if you have any questions please do get in touch.

## Section 2

# Who, what, when and how we rated

And what's new in this year's report

### Who we rated

In June 2017 our analysts reviewed the digital communications of the top 100 asset managers (Source: The top 400 asset managers ©IPE Research, as at 31/12/16). Each firm was rated against 50 criteria covering digital engagement (useful functionality) or evidence (substantive content) across four key categories:

**1** Website functionality

**2** Website content

**3** Active social media channels

**4** Social media content

### What we rated

We examined each asset manager's publicly available digital footprint. We didn't seek access to any private or subscription channels.



### How we calculate our scores

Each company is allocated an overall percentage score. This is calculated by adding together the scores for the 50 engagement and evidence criteria. We then use the scores to categorise each asset manager with one of four definitions of their digital intelligence; determined, energetic, focused or lacklustre. Where we present averages they are based on the full listing of 100 firms. The five firms with the highest scores are also reviewed with expanded case studies.



### New criteria for 2017

This year we have added the following additional criteria:

Website personalisation, productivity tools, fund and strategy information, document library and learning materials.



### How can Living Ratings help?

This ratings report provides useful benchmarks that can help you compare your activities with those of your peers by highlighting the strengths and weaknesses of their digital communications.

Our aim is to give you the evidence and insight to help you formulate an approach to digital communication that is aligned with your users' expectations, your brand and your business

## Section 3

# The top 20 Asset Management firms

*The world's leading asset management firms lack determination in digital and social media engagement.*

*Our findings indicate that they are failing to support their audiences through digital communications which combine useful functionality and substantive content.*

*In the table (right) you'll note that only 40% of the IPE Top 20 firms have made our Top 20.*



IPE Ranking	Living Ratings Rank	Firm Name	Score	%
92	1	Russell Investments	536	78.82%
36	2	Schroder Investment Management	524	77.06%
7	3	PIMCO	517	76.03%
18	4	T. Rowe Price	515	75.74%
38	5	Columbia Threadneedle Investments	499	73.38%
1	6	BlackRock	495	72.79%
100	7	Putnam investments	488	71.76%
23	8	Franklin Templeton Investments	487	71.62%
17	9	Invesco	485	71.32%
2	10	Vanguard Asset Management	483	71.03%
4	11	Fidelity Investments	462	67.94%
56	12	Standard Life Investments	447	65.74%
46	13	Aberdeen Asset Management	445	65.44%
84	14=	Janus Henderson	423	62.21%
48	14=	Blackstone	423	62.21%
22	16	Legg Mason	418	61.47%
76	17	Voya Investment Management	414	60.88%
52	18	Eaton Vance Management (Int.)	410	60.29%
10	19	Goldman Sachs Asset Management (Int.)	396	58.24%
9	20	Prudential Financial (PGIM)	393	57.79%

## Section 4

# Asset manager ratings and rankings 2017

Check your overall score and how you rank against your competitors.

● Determined ● Focused ● Energetic ● Lacklustre

Rank	Firm Name	Score	%		Rank	Firm Name	Score	%	
1	Russell Investments	536	78.82%	●	51	Swiss Life Asset Managers	222	32.65%	●
2	Schroder Investment Management	524	77.06%	●	52	Guggenheim Partners Investment Management	218	32.06%	●
3	PIMCO	517	76.03%	●	53=	RBC Global Asset Management	216	31.76%	●
4	T. Rowe Price	515	75.74%	●	53=	Pioneer Investments	216	31.76%	●
5	Columbia Threadneedle Investments	499	73.38%	●	55	Caisse de dépôt et placement du Québec	214	31.47%	●
6	BlackRock	495	72.79%	●	56	Credit Suisse Asset Management	212	31.18%	●
7	Putnam investments	488	71.76%	●	57	Standish Mellon Asset Management	199	29.26%	●
8	Franklin Templeton Investments	487	71.62%	●	58	Western Asset Management Co	198	29.12%	●
9	Invesco	485	71.32%	●	59	Dimensional Fund Advisors	196	28.82%	●
10	Vanguard Asset Management	483	71.03%	●	60	Bridgewater Associates	189	27.79%	●
11	Fidelity Investments	462	67.94%	●	61	BNP Paribas Asset Management	178	26.18%	●
12	Standard Life Investments	447	65.74%	●	62	Santander Asset Management	176	25.88%	●
13	Aberdeen Asset Management	445	65.44%	●	63	APG	174	25.59%	●
14=	Janus Henderson	423	62.21%	●	64	Principal Global Investors	168	24.71%	●
14=	Blackstone	423	62.21%	●	65	DekaBank	167	24.56%	●
16	Legg Mason	418	61.47%	●	66	Pictet Asset Management	152	22.35%	●
17	Voya Investment Management	414	60.88%	●	67	New York Life Investments	150	22.06%	●
18	Eaton Vance Management (Int.)	410	60.29%	●	68	PGGM	147	21.62%	●
19	Goldman Sachs Asset Management (Int.)	396	58.24%	●	69	Union Investment	144	21.18%	●
20	Prudential Financial (PGIM)	393	57.79%	●	70	Natixis Global Asset Management	140	20.59%	●
21	American Century Investments	381	56.03%	●	71	UBS Asset Management	127	18.68%	●
22	AXA Investment Managers	364	53.53%	●	72	Nikko Asset Management Europe	125	18.38%	●
23	Amundi	357	52.50%	●	73	Manulife Asset Management	124	18.24%	●
24	M&G Investments	356	52.35%	●	74=	BMO Global Asset Management	115	16.91%	●
25	Aviva Investors	349	51.32%	●	74=	AQR Capital Management	115	16.91%	●
26	MFS Investment Management	344	50.59%	●	76	Geode Capital Management	114	16.76%	●
27	Charles Schwab Investment Management	342	50.29%	●	77	Lazard Asset Management	102	15.00%	●
28	AllianceBernstein (AB)	336	49.41%	●	78	Deutsche Asset Management	95	13.97%	●
29	Fidelity International	331	48.68%	●	79	HSBC Global Asset Management	80	11.76%	●
30	Capital Group	325	47.79%	●	80	Itaú Asset Management	70	10.29%	●
31	BNY Mellon Investment Management	322	47.35%	●	81	Nomura Asset Management	66	9.71%	●
32	Aegon Asset Management	317	46.62%	●	82	Bram - Bradesco Asset Management	57	8.38%	●
33	First State Investments	312	45.88%	●	83	MEAG	56	8.24%	●
34	Loomis Sayles & Company	311	45.74%	●	84	Mellon Capital	55	8.09%	●
35	Baillie Gifford & Co.	310	45.59%	●	85	Generali Investments Europe	52	7.65%	●
36	Neuberger Berman	304	44.71%	●	86=	Legal & General Investment Management	50	7.35%	●
37=	State Street Global Advisors	301	44.26%	●	86=	La Banque Postale Asset Management	50	7.35%	●
37=	J.P. Morgan Asset Management	301	44.26%	●	88	TCW	49	7.21%	●
39	Allianz Global Investors	298	43.82%	●	89	Eurizon Capital	47	6.91%	●
40	Morgan Stanley Investment Management	291	42.79%	●	90	Dodge & Cox	46	6.76%	●
41	Northern Trust Asset Management	285	41.91%	●	91	Federated Investors	39	5.74%	●
42	Robeco Group	280	41.18%	●	92	MetLife Investment Management	35	5.15%	●
43=	SEI	273	40.15%	●	93	Apollo Global Management	33	4.85%	●
43=	SEB	273	40.15%	●	94	Mitsubishi UFJ Trust and Banking Corp.	30	4.41%	●
45	Insight Investment	272	40.00%	●	95	Asset Management One International	21	3.09%	●
46	Barings	265	38.97%	●	96	Wells Fargo Asset Management	18	2.65%	●
47	NN Investment Partners	264	38.82%	●	97	Wellington Management	10	1.47%	●
48	Nordea Asset Management	260	38.24%	●	98	China Asset Management Company	3	0.44%	●
49	Macquarie Asset Management	232	34.12%	●	99	Affiliated Managers Group	0	0.00%	●
50	Nuveen investments	229	33.68%	●	100	Sumitomo Mitsui Trust Bank	0	0.00%	●

Natixis Asset Management is excluded from our ratings to avoid confusion with Natixis Global Asset Management. It was replaced with Standish Mellon Asset Management.

BNY Mellon cash Inv. Strategies is excluded from our ratings as it's website is a duplicate of BNY Mellon Investment Management. It has been replaced with First State Investments.

Janus Capital Group is now known as Janus Henderson. Our ratings relate to the new website of the merged entity.

## Section 5

# Are your digital communications *determined, focused, energetic or lacklustre?*

By analysing the individual digital engagement and evidence scores we have categorised each of the top 100 asset managers into one of four areas according to their digital intelligence (or lack of it).

Please note: In order for your firm's digital intelligence to be classified as 'determined' both its digital engagement and evidence scores must rate above 65%.



## Section 6

# Asset managers' digital FAI communication by numbers

The digital **successes** and **failures** of the world's leading asset managers:



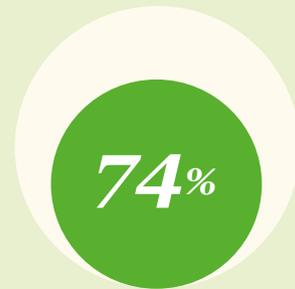
### Digital successes (over 50%)



 utilise geo-location techniques



 link users to corporate graduate career content



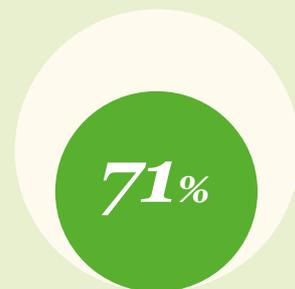
 explain content with info-graphics



 have a responsive website



 feature social media links on home page



 are active on Twitter



 employ user profiling

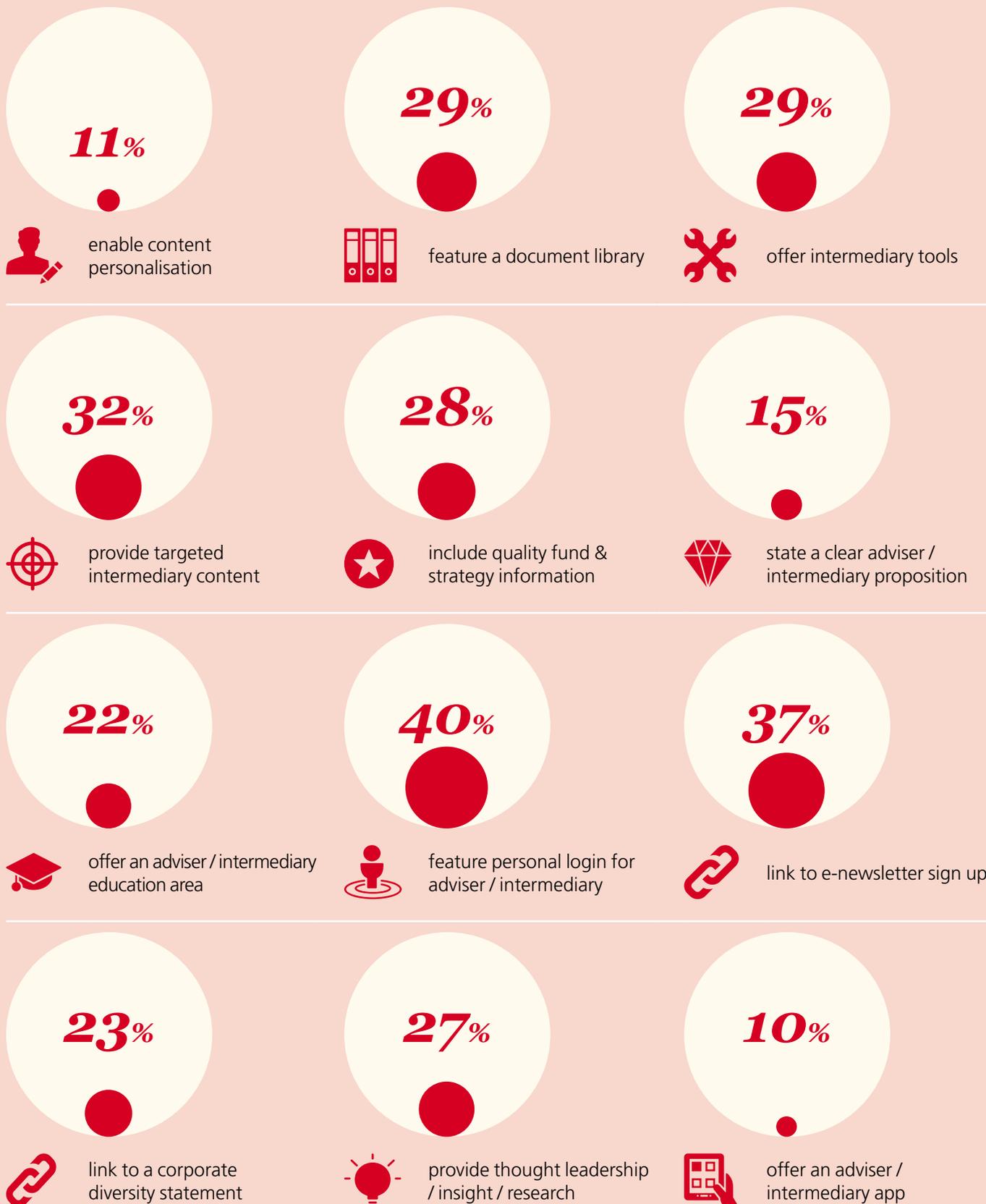


 enhance content with interactive / video / webcasts



 are active on LinkedIn

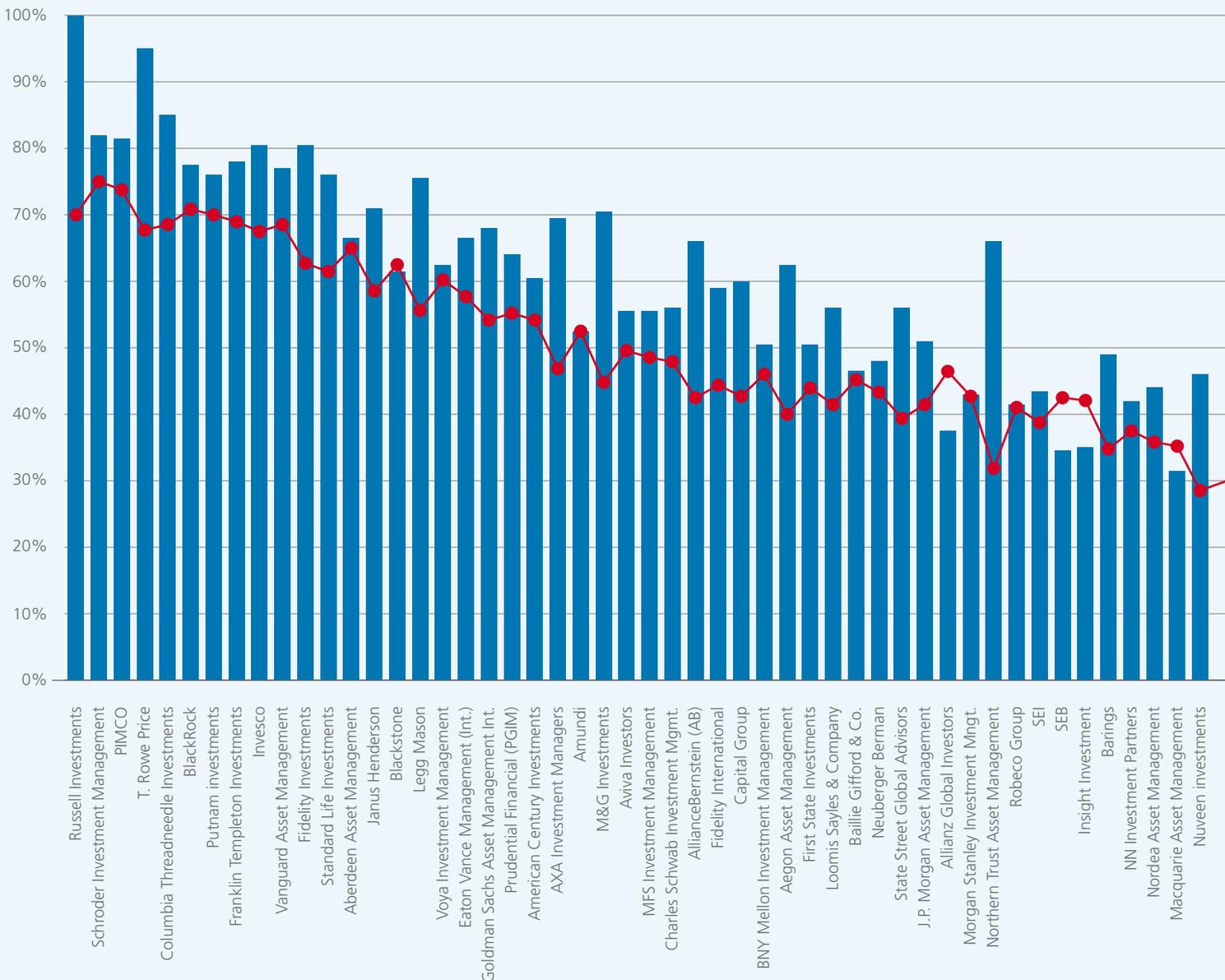
## Digital failures (under 50%)

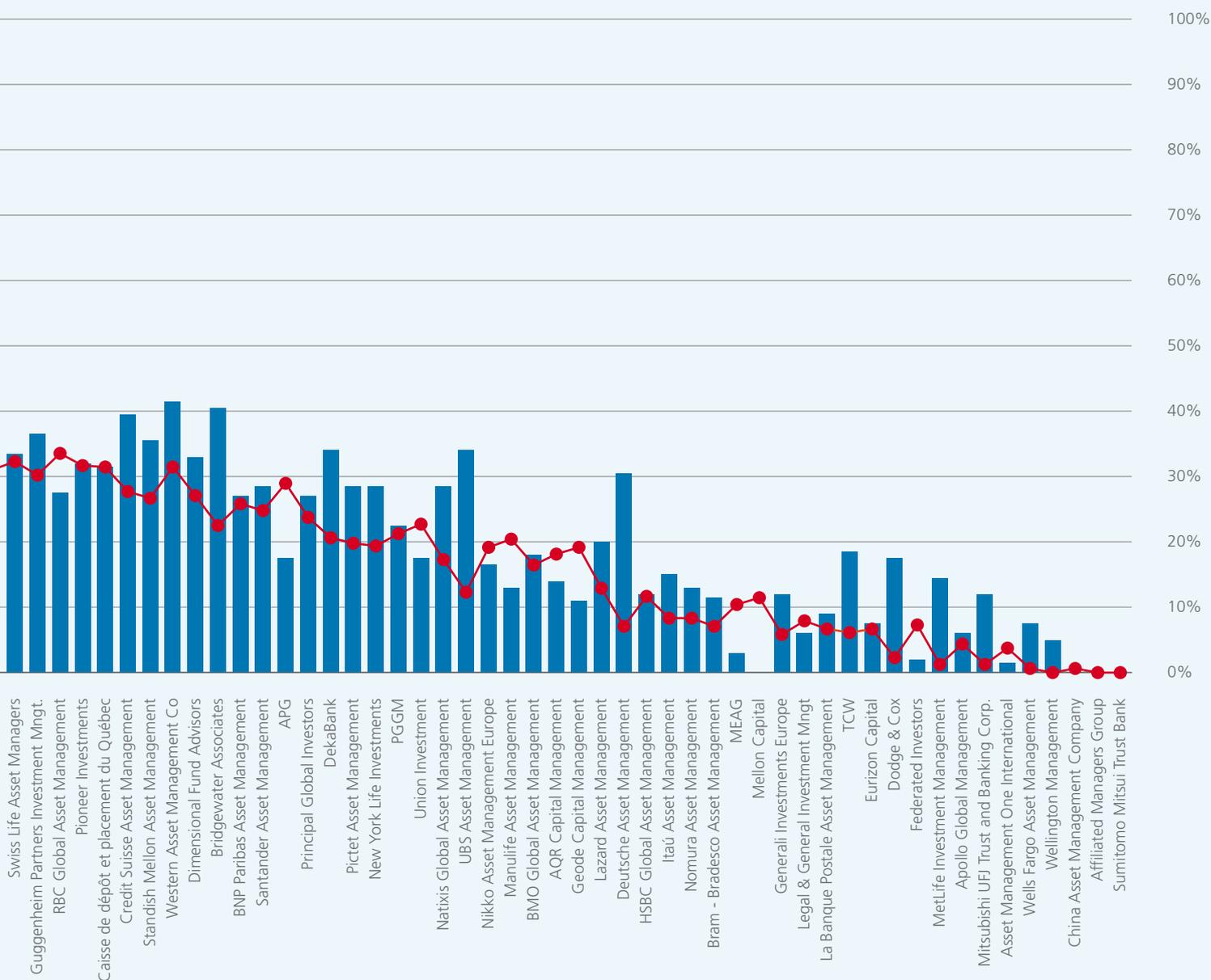


## Section 7

# Evidence vs. Engagement tracker

Comparing the two key metrics in our ratings.





## Section 8

# Connectivity and content

**The digital communication sphere: 12 key things for a best in class asset management website.**

### Client login

Private, secure areas, accessed by user name and password allows FAIs to access premium content. This can ensure that website users return time after time.

### Geo-targeting and user profiling

Industry standards demand that your website recognises users' geographic location and adapt to individual user profiles. This functionality helps target relevant content to FAIs.

### Website personalisation

Personalisation functionality enables FAIs to tailor content on certain pages and select topics they may be interested in without a sign up or login. Some sites also feature subscriber areas.

### Interactive, video and webcasts

Non-static features such as interactive graphics, videos, webcasts and podcasts play a vital role in user engagement. They can simplify complex ideas with step-by-step animation. Videos enable users to view key individuals in real-life.

### Productivity tools

The leading asset managers in our study feature dedicated and useful proprietary or third-party tools that increase FAI's efficiency and productivity and play a key role in building brand loyalty.

### Newsletter and alerts

E-news subscription functionality enables asset managers to deliver timely and relevant news and insights to FAI's desktops or mobile devices wherever and whenever they want it.



### Learning materials

The leading websites in our study feature many examples of dedicated areas containing useful learning materials for FAIs, which aids Continuous Professional Development.

### Thought leadership and insight

Quality thought leadership is a key differentiator for any asset manager looking to build their intellectual capital and promote their expert research. It can exist in long form on a website or be disseminated in smaller snapshots across social media.

### Updated blogs

Regularly updated blogs can deliver a constant stream of new users to a website. Relevant and well-written blogs can help FAIs solve real world problems, thereby building trust and respect in the asset manager.

### Document library

Document libraries or literature centres, simplify and speed up the process of accessing and storing useful content such as factsheets, performance data, manager commentaries, press releases, and marketing literature.

### Fund and strategy information

The best fund and strategy pages are designed with precision typography and sort listings by fund / style / objective. They feature relevant documentation, factsheets, videos, performance charts and interactive content to provide a detailed drill down or summary overview.

### Targeted content

Dedicated 'Adviser Centres' help FAIs to personalise content according to their specific needs and interests, support their day-to-day business activity and contain how-to guides, instructional videos, jargon busters and investment tutorials.

## Section 9

# Defining digital leadership

***What do digitally determined asset managers have in common and what makes them stand out from the crowd?***

*Aside from useful functionality, the thing that all great websites have in common is their ability to keep their users coming back for more. Content is the key.*



### **Create original content**

Original also means originality. Recycling or retweeting the same articles or blogs over and over again is not original. If your content is done to death, no one will link to it and no one will share it – and that defeats the whole point. If you write original content, search engines will help your site get more exposure. Google penalises sites with duplicate content and rewards those that feature original content. So not only does great content make a better website, it can improve your site's rankings, which has a positive impact on your firm.

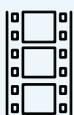
*80% of people will read your headlines, but only 20% of those will read on.*



### **Focus on strong headlines**

A good headline sparks interest and invites the reader in. 80% of people will read your headlines, but only 20% of those will read on. The headline is as important as the article or post itself. Take time with your headlines. They are the first thing people read and the last thing people remember. Headlines help people decide if they want to read your article or not.

*Avoid generic 'stock' images; invest in a library of bespoke original photos or graphics.*



**Add images, infographics and video**

Some people learn better by seeing or hearing. Everyone learns more from visual aids. Whether you use pictures, videos, or diagrams, they will help illustrate your point. Whatever you're writing about, add pictures that truly reflect your firm. Avoid generic 'stock' images; invest in a library of bespoke original photos or graphics. No one wants to read lengthy paragraphs of text. Remember, you're telling stories NOT writing a book.

*Search engines don't like dormant sites so you need to update your site regularly with quality content.*



**Continually update your content**

A blog is for life; not just Christmas. Starting a blog or website is a long-term commitment. Sure you can write a couple of posts, start up a LinkedIn channel and then leave it alone, but you won't get many readers, followers or new leads. Search engines don't like dormant sites so you need to update your site regularly with quality content. Those sites that post new content more frequently have stronger traffic. How often should a blog or site be updated? It's up to you; everyone has different resources and priorities. But try to add updates and new content every couple of days.



**Make your content useful**

Quality content gives users a sense of how your market insight is relevant to them with their particular roles and responsibilities. Try not to patronise or instruct them. Respect the reader and provide assurance that you understand the realities of their investment needs and day-to-day business activities. Remind yourself that people visit your website because they want to learn something.

*When people use a website, what they ultimately want is an answer, and it's your job to deliver one.*



**Provide answers ...fast!**

When people use a website, what they ultimately want is an answer, and it's your job to deliver one. It's the same when people are reading a blog post, viewing an infographic or watching a video — they want an answer so they can gain knowledge. And remember, people don't just want answers, they want them fast. So make your content easy to scan so people can pick up the important bits quickly.



**It's what you leave out that matters**

The best content writers eliminate fluff and endless jargon or acronyms; even if your audience is familiar with the technicalities. It's hard work and takes time but it makes for a better read. Nothing beats a brief, to-the-point blog post or article that distills the best ideas and information. A longer blog post doesn't mean a better blog post.



**Do the hard yards**

Don't treat content lightly. It's difficult, and great content takes time to gather, research and write. Ask yourself; is it memorable? Is it relevant? Is it attractive? Is it useful? Would I read it? If the answer is yes, your readers will thank you by returning to your site again and again and by sharing your content across the globe. **But, if you don't have anything useful to say, then say nothing.**

Case studies

# 1 Russell Investments

## Financial Professionals, welcome!

For its digital, FAI communication, Russell Investments is best in class. And the website excels from the get-go. First time visitors are defined by accurate user-profiling and geo-location that delivers extensive and targeted content plus a host of useful tools, resources and market insights to the desktop on each and every visit. The home page states Russell's core purpose with clarity that is rare in the sector; 'Thank you and welcome,

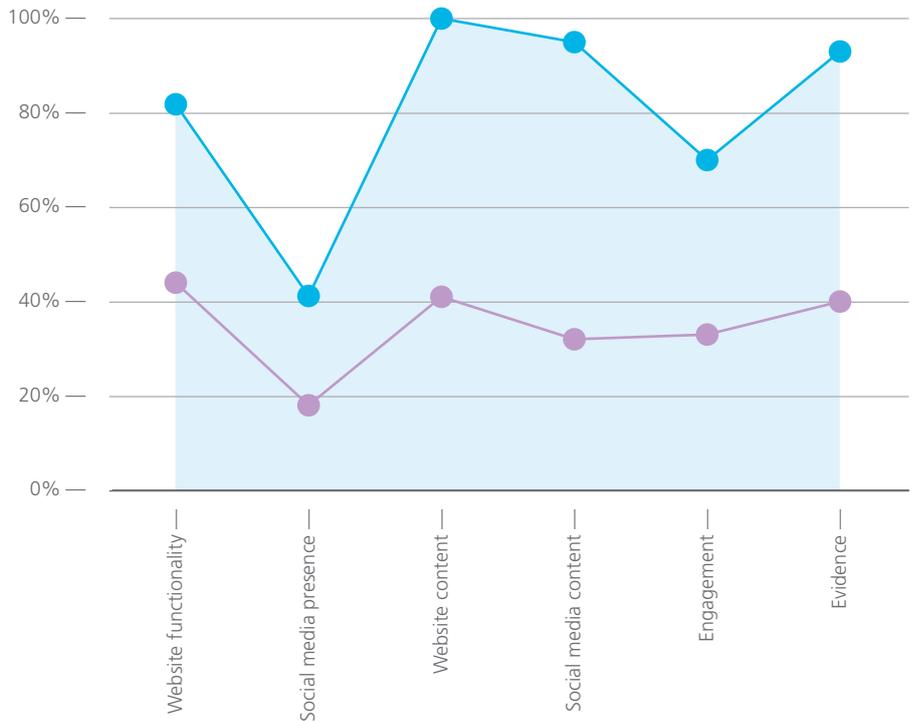
financial professionals. The site will provide you with content most relevant to financial advisers on this and on future visits.'

Optimum relevance is maintained with FAI-focused solutions that include asset allocation, capital markets insights, factor exposures and manager research. Precision-targeted resources include adviser tools and content where Russell Investments leverages its extensive practice management and business-building experience to help FAI's develop a better and more efficient practice.

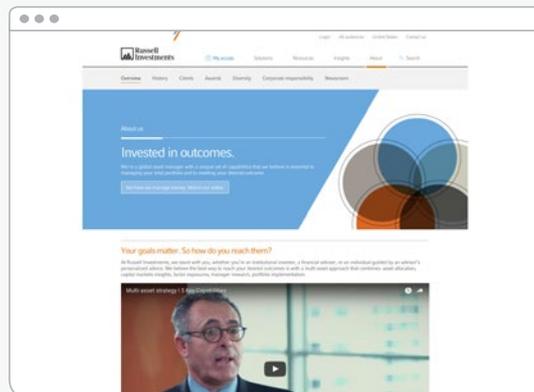
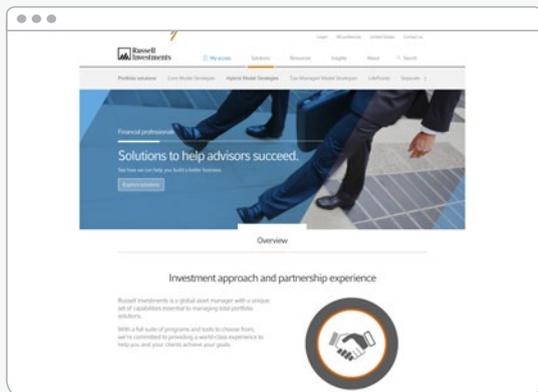
The site's fund pages are an object lesson in digital real estate management. Beautiful typography and information graphics present a dazzling array of complex financial information and related content with the utmost legibility. Another standout is Russell's 'Helping Advisors' blog; seriously detailed insight yet engagingly written and presented so that it's a seamless part of the user journey. If you only visit one website for inspiration make sure it's this one.

### Russell Investments

[russellinvestments.com/us/solutions/financial-professionals](http://russellinvestments.com/us/solutions/financial-professionals)



- Russell Investments
- Average



Images © Russell Investments

Case studies

# 2 Schroder Investment Management

## Complete digital performance.

Schroders offers a big digital experience that befits an industry titan. It makes its mark on our ratings with a complete performance across website functionality where it ticks all the boxes for user experience. To start with, all this critical FAI functionality is accessed from a visually powerful landing page that brings Schroders' global brand to life with fast-paced and punchy video.

A click on the 'Adviser' link takes you further but the destination is no less graphic and

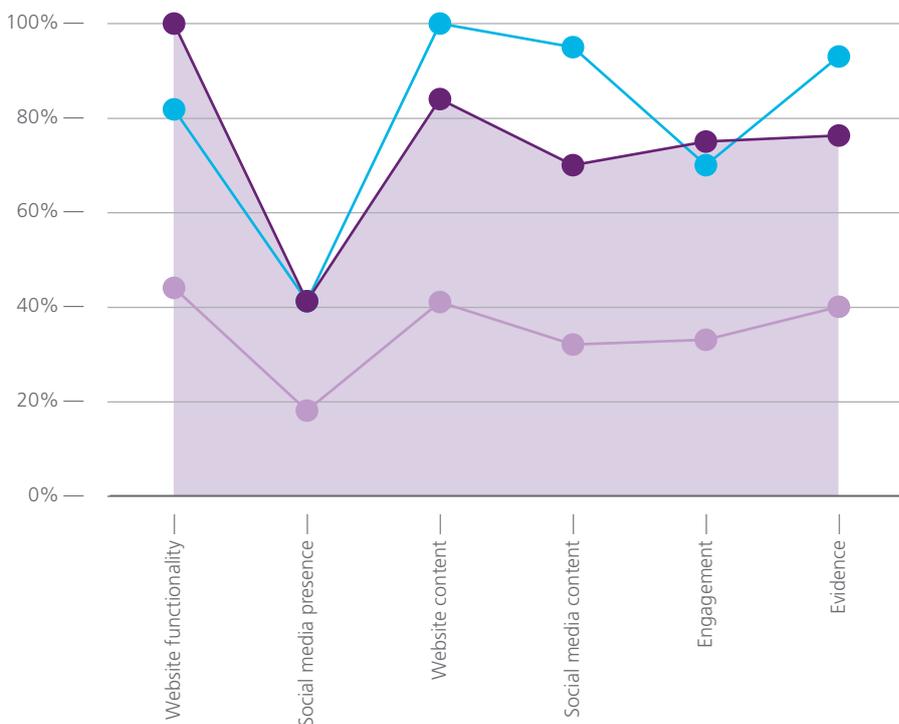
still seriously engaging. No surprises – it's informative too. Schroders' comprehensive adviser / home page enables the user to access extensive content with pinpoint accuracy. Fund information? Check out the funds and performance pages. The design and typography are superb. Insights? Take a look at the 'Value Perspective' blog where words and imagery combine to educate and inform in style with deep substance.

For starters 'Personalise your page'. Then, if you need valuations, click on the 'Tools' link

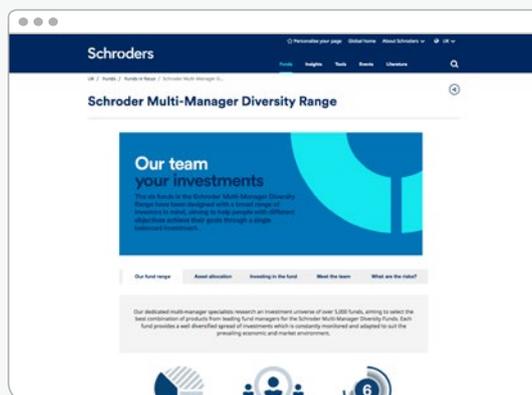
where you'll also find 'Dynamic Planner' risk profiling, and CPD training. There's even a 'Reasons why generator' for creating key investor letters. Schroders' experts feature in the 'Events' section where, past or present, it's all here in video. Literature? Schroders' library features brochure-ware and helpful documentation that's designed to make lives easier for their FAI audience. If you're interested in a site that's a perfect mix of corporate information and helpful business functionality Schroders delivers.

## Schroder Investment Management

[schroders.com/en/uk/adviser](http://schroders.com/en/uk/adviser)



- Schroder Investment Management
- Average
- Industry leader



Images © Schroder Investment Management

Case studies

# 3 PIMCO

## A singular focus.

Just a single percentage point separates the second- and third-placed firms in our study and PIMCO's top five spot is thoroughly deserved. PIMCO's website has a singular focus on providing access to a wealth of thought leadership, investor resources and educational materials to financial advisers and intermediaries.

Evidence of PIMCO's digital determination is everywhere; across their website, blog and not least in a full spectrum of active social media channels. As an adviser / intermediary

resource PIMCO.com/financial adviser is super-fit for purpose with a plethora of online resources. There's 'Smart Charts' – a library of economic and market charts that users can download, save and adapt for their own use. In addition, there's a 'hypo tool', 'subscription centre', 'saved content' functionality, and a highly effective 'guided product finder'.

By employing a range of functionality techniques PIMCO ensure that every user action is positive and well-rewarded. But all this useful functionality is just the beginning. However deep you go in

this site stimulating industry insight and economic outlook abound. PIMCO's blog is a particular highlight featuring timely insights, beautifully presented, on markets and macroeconomics around the world.

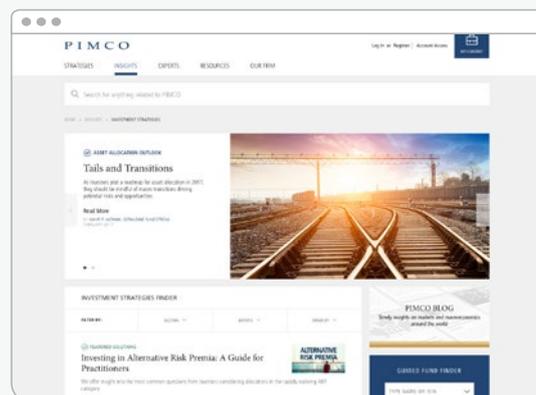
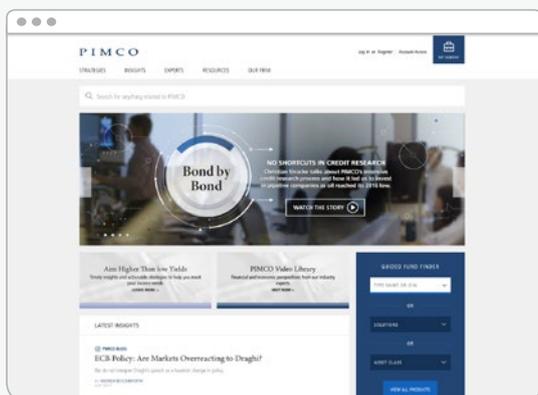
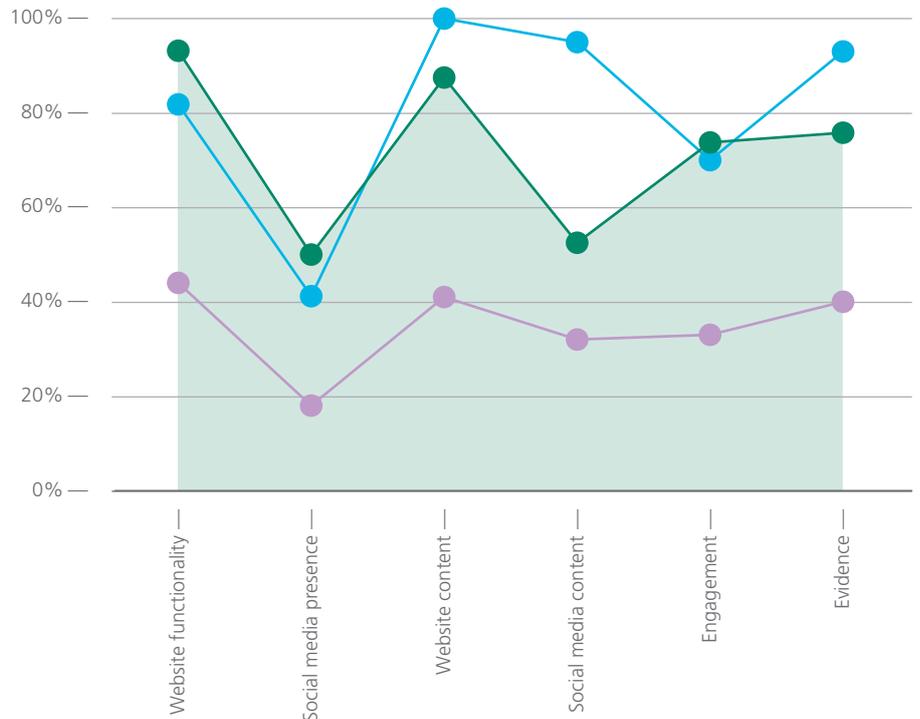
PIMCO's social media suite provides alternative access to PIMCO's latest thinking on key economic and financial market trends. Follow @PIMCO for insights on economies, markets and investing supported by a rich mix of charts, photography and video. It's one of the strongest social media channels in the sector.

## PIMCO

pimco.com/en-us



- PIMCO
- Average
- Industry leader



Images © PIMCO

Case studies

# 4 T. Rowe Price

## Outstanding digital differentiation.

T. Rowe have created an FAI website that instantly differentiates their desire to focus on their audience. First, users are greeted by a stunning home page that combines key financial data with an unrivalled range of practical tools and targeted help for the FAI audience. Check out the 'Funds in Focus' summaries featuring fund highlights and KPI's. We love the use of clever writing, outstanding typography and information

graphics to convey key facts in an instant. They're an ultra-simple but blindingly effective link to one of the best-presented fund sections in the sector.

In addition to the financial focus the supporting benefits are seemingly endless. There's 'Next Generation Thinking' a shed load of value-add desktop tools and resources to help FAI's incorporate innovative and actionable insights into their practices. Then there's an invitation to 'Elevate Your Practice With Financial Wellness' a practical resource with yet more tools and actionable ideas to

enhance financial the financial health of an FAI's practice.

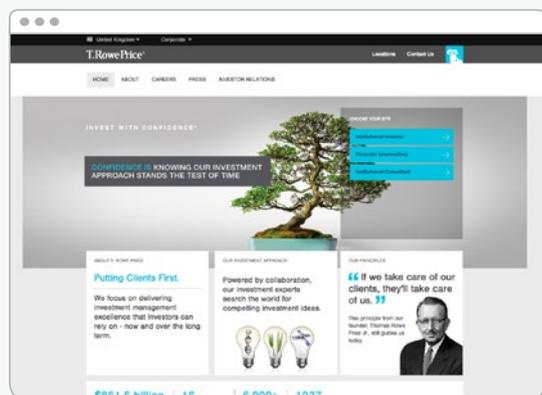
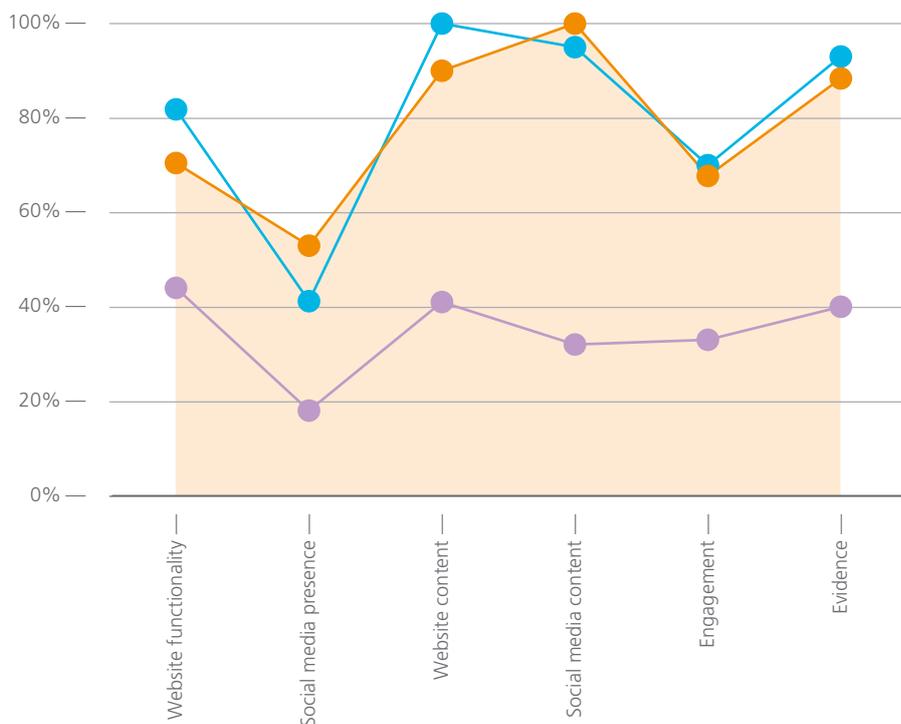
What's more, FAI's can take all T. Rowe's best ideas with them using the award-winning 'MarketScene' app. It's designed specifically for advisers based on research with advisers. T.Rowe Price have succeeded in differentiating their social media suite too; albeit without the helpful home page links. @TRowePrice is aimed squarely at the FAI audience with 'investment insights to keep you informed and help your clients make better investment decisions'.

### T. Rowe Price

www3.troweprice.com/  
gis/fai/us/en/home.html



- T. Rowe Price
- Average
- Industry leader



Images © T.Rowe Price

Case studies

# 5 Columbia Threadneedle Investments

## Consistency and customisation.

We're delighted Columbia Threadneedle has made our top five. Not only does the website and social media suite perform across all our evidence and engagement criteria – it's a joy to look at and a pleasure to read. Every aspect of its success has been driven by an unrelenting desire to help FAI's create solutions and achieve investors' goals. From the home page with 'Solutions you can trust, in markets you can't', to the awesome fund pages; from the timely blogs to the related 'Perspectives'

videos there's a clear digital determination to help FAI's succeed.

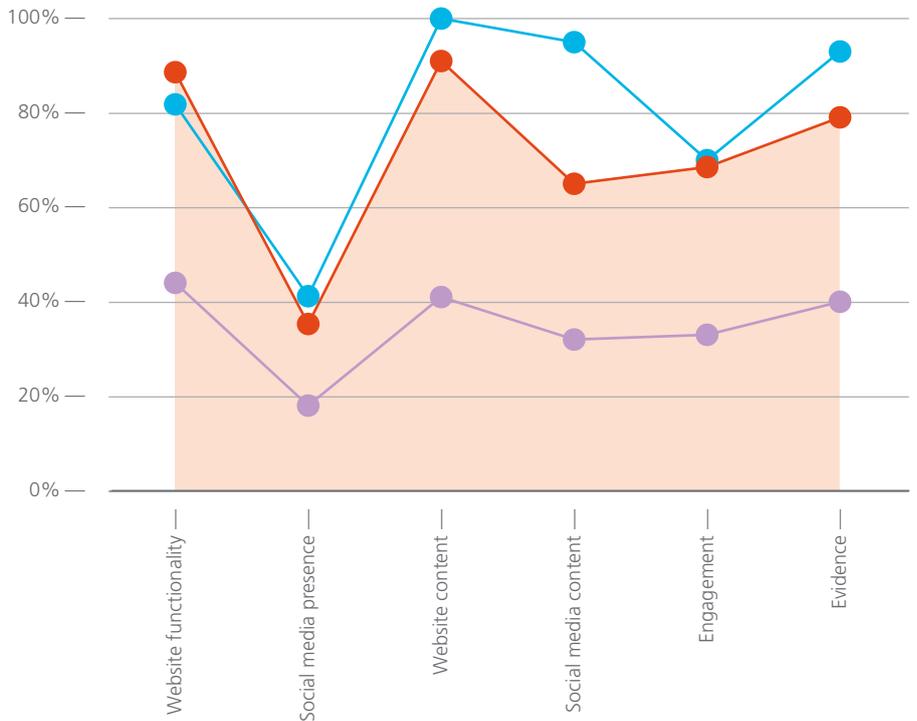
Columbia Threadneedle understands that highly technical content is a no barrier to communication. Through careful use of a consistent digital identity, precision typography, judicious use of colour and a deep understanding of user behaviour they bring a wealth of ideas and information to life and place it at the users fingertips. It's because of this understanding that users don't have to leave the home page to find the help

they need. A click on 'My Funds' delivers a customised list so users can track and watch their funds. In addition, a range of FAI client goals are signposted with lovely graphic links.

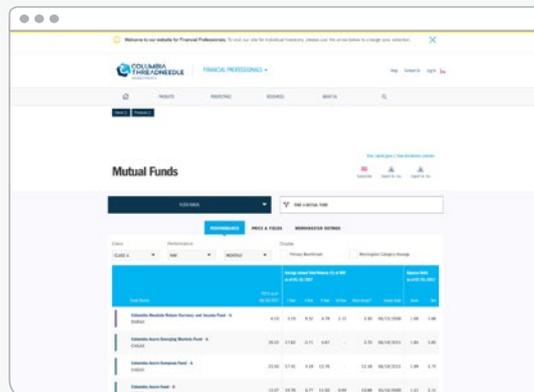
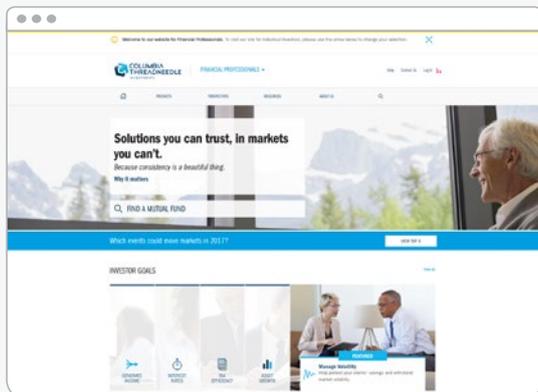
In common with their peers in our top five, they seek to educate as well as inform. Columbia's 'Learning Centre coordinates 'Knowledge + Know-how' to help users handpick the services and programs to expand and grow their practice. For FAI products, perspectives, and resources; Columbia Threadneedle delivers.

## Columbia Threadneedle Investments

columbiathreadneedleus.com



- Columbia Threadneedle Investments
- Average
- Industry leader



Images © Columbia Threadneedle Investments

## Section 11

# The importance of determined digital communication

The rationale for building a determined digital brand is the same in any sector. Asset managers are no different. Those that actively invest in and resource the creation of quality digital experiences do so in order to positively engage with their various audiences.

These firms build an aura – their brand – that adds value. This brand value acts as a powerful magnet. It attracts new investors, grows existing ones and draws in the most talented and forward-thinking expertise.

Firms at the bottom of our ratings, those that are failing to invest in a quality digital experience do so under the misapprehension that a website with vast quantities of ‘about us’ content is an effective substitute for FAI communication.



**Digitally lacklustre digital asset managers talk ‘About us’**

It’s their idea of a core purpose. Little digital space is given over to the market insight or thought leadership – substantive content – that bring people to your website and keep them coming back for more.



**Digitally determined asset managers build experiences for their users**

Asset managers that take a determined approach to digital engagement have a relentless audience focus. Their successful formula combines **two key elements**:

1



**Engagement  
(Useful digital  
functionality)**

Determined firms recognise the potential of useful digital functionality backed by a client-focused channel strategy. They create appealing and relevant content on a variety of media, including stimulating graphics, audio, animation and video.

2



**Evidence  
(Substantive  
digital content)**

Determined firms demonstrate clear purpose. They offer FAIs informative messaging, relevant subject matter and the kind of insight that shows a deep understanding of their issues and interests. This demonstrates a desire to help them succeed.



**The risks of lacklustre digital communication**

Without strong digital brands, firms risk being ignored in the fund selection process. After all, between alpha and beta strategy offerings, identical fund price and fund performance – which one would you choose?’

# About Living Group

*At Living we blend our deep sector knowledge, uncompromised thinking and award-winning creativity to help our clients in the financial, professional services and technology sectors create difference through engaging branding, disruptive digital experiences and powerful integrated campaigns.*

## Deep sector knowledge

A deep understanding of our clients' sectors means we challenge thinking, inspire ambition, and deliver meaningful results across their organisations.

In a world that is always changing, content rich and visually crowded – we help our clients communicate their difference and stay ahead.

## How we help our clients



### Engaging branding

With creative teams in London, Hong Kong and New York we connect award-winning ideas with proven brand results. Driving your business performance with strategic thinking, brand creation and cut-through messaging, we fuse these key elements together to create highly effective results.



### Integrated campaigns

We can help transform your brand objectives into tangible business benefits – lifting your profile, prompting consideration and stimulating dialogue. Researching, planning and executing integrated campaigns worldwide, we use cut-through ideas and creative, backed by proven analytics to measure your success.



### Disruptive digital

Our digital team connect your brand and your audiences. Around the world. Around the clock. We build seamless brand experiences online, using bespoke IA, engaging design and cutting-edge technology across multiple devices and platforms.



### Creating difference for our people and communities

But, we don't just make a difference for our clients, we also make a difference for our people, and the communities we work within. We have an open and collaborative culture that gives our people room to thrive. We encourage passionate freethinking, ideas that challenge the conventional, and celebrate individualism and diversity.

Find out more at:

[www.living-group.com](http://www.living-group.com)

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**Living Ratings provides the evidence-based insight you need to develop your digital and social media communications, enhance your digital brand and improve your return on investment.**

We are already working on our next ratings report. If you have any recommendations on data you would be interested to see in our analysis, please let us know.

## What's your score?

Maybe you'd like a more detailed analysis of your firm? Or you feel you could benefit from a new website, relevant content or a more effective social media strategy? If so, we'd love to hear from you.



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