

Living^D

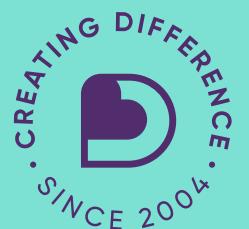
OPPORTUNITY

KNOCKS



Living Views | 2020

Insights designed to give your brand, digital presence and campaigns competitive advantage



BIRDS



VIEWS!

Welcome to the first edition of **Living Views**

Every opportunity, a new beginning

The global pandemic and resultant lockdowns across financial and professional services businesses that rely so much on in-person activity have challenged two critical areas: brand loyalty and digital engagement on web and social.

Your audiences – beloved clients, critical prospects – look to you for the fortitude of your brand and the clarity of who you are, what you do and why you matter. When they find you – online – they expect clear information and inspiration.

During the pandemic our talented team of experts from across the agency shared their views on helping firms ensure their brand and digital presence are as strong as they can be. We've now collected these insights into this single guide for you.

How to seize this moment

On the following pages, you can read more on the importance of investing in your brand and rallying your messaging around a defined purpose. We share how to be more strategic in your content development and distribution, and to do so with the right tone of voice. There is also a focus on your people and the importance of making their role a prominent part of your narrative. And for telling your stories, we recommend balancing the evidence of your brand values with a digital functionality that deepens user experience and allegiance. Last but not least, we underscore the benefits of embracing technology like SEO, voice search, interactive tools and data visualisation that will attract, deliver, and sustain your client relationships.

We hope that you'll read the following Living Views as thought-starters for how to refresh and reposition your brand for the challenges that lie ahead. And we'd love for these ideas to be a conversation-starter with you.



Duncan Shaw
Executive Creative Director

There is so much to be done, now and moving forward. Why? Because that's opportunity you hear knocking. These additional actionable ideas will also help propel your brand towards success:

- ▶ Surface intellectual capital and show pride in your firm's collective spirit and ethos.
- ▶ Be credible and authentic – set your marketing around principles that capture your firm's unique personality.
- ▶ Challenge your brand constantly so it evolves to meet the needs of your changing sector and the world at large.
- ▶ Optimise your investment in technology by rightsizing it for your needs – as well as your ambitions.
- ▶ Don't let value-added functions lie idle. Keep on top of your social strategy: be seen and heard where appropriate. But always be listening.
- ▶ Don't forget that a brand marketing strategy is only successful if it advances a business strategy. All your content and comms work should be feeding the funnel. Your brand should fuel your business. Period.

LIVING
&

BREATHING

YOUR

BUSINESS

1

Continue to invest in *YOUR BRAND*

Stay invested, your brand needs you

In times of turbulence, your brand becomes a North Star – guiding and welcoming your clients. You need to ensure it's as bright as can be. Is it? What about the brilliance of your website? It's the digital incarnation of your brand. Does it deliver the right experience?

What does success look like?

Successful companies nurture and reinforce their brands constantly. And they mind their websites and social channels with a continual regard for how they engage their clients. Leaders don't invest and walk away – they stay invested.

With every edition of Living Ratings, our proprietary research report, we see how the firms that stay atop their sector do so by developing their brand and digital intelligence. They command the narrative of 'who we are, what we do, why we matter.' They put their clients' needs front and centre in how they tell their story. And when we see firms leapfrog their competitors, it's because they've given new attention to how their brand comes alive – in a digital experience that balances compelling content with effective functionality. But to stay ahead, they must stay invested.



Successful companies nurture and reinforce their brands constantly. And they mind their websites and social channels with a continual regard for how they engage their clients.

Time for reflection

Have you considered a digital or content diagnostic that will provide you with evidence based insights and actionable outcomes to support the drive for change? We invite you to discover the benefits here, or contact: greg.hobden@living-group.com for more information.

Click [here](#) to find out more about our digital diagnostic.



**RISE &
OUTSHINE**

2

The importance of **EVIDENCE** and **ENGAGEMENT**

With your clients' daily screen-time skyrocketing, information architecture (IA) and user experiences (UX) are of paramount importance. Is your digital functionality as useful as it can be? And is the content it's delivering pertinent to your stakeholders' needs?

Where to begin?

Successful companies that take a determined approach to digital intelligence have a relentless client focus that drives long-term, meaningful relationships. Their winning formula balances two key elements: Engagement (website functionality & social media channel strategy) and Evidence (brand and content).

They offer informative brand-driven messaging that shows a deep understanding of client issues and interests. Intuitive search, guided navigation and UX surface intellectual capital in a variety of media, including infographics, video, animation, and audio, designed to captivate, educate and motivate their audiences. Lastly, they don't do it in a vacuum. They make sure their website is backed by a targeted social media channel strategy, to inform and inspire new and existing stakeholders.

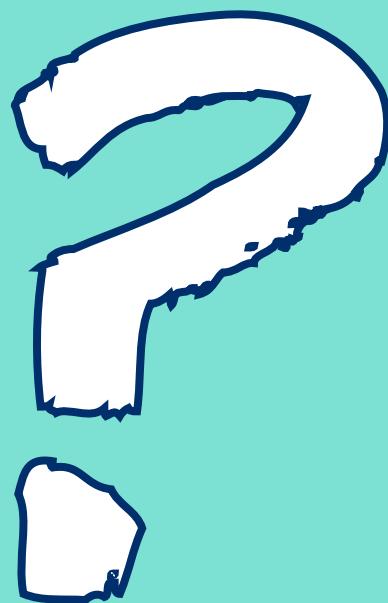


Their winning formula balances two key elements: Engagement (website functionality & social media channel strategy) and Evidence (brand and content).

Brand intelligence, now more than ever

You can download our recent Living Ratings reports on law firms, asset managers and professional services firms for more insights on how to make your brand and digital intelligence the right, up-to-date fit for your business strategy.

Click [here](#) to view Living Ratings.



WHAT'S

YOUR BRAND

PURPOSE

3

Does your brand have a sense of **PURPOSE?**

Over the past year, we've seen a lot of attention being paid to Purpose – capital P – in which companies often get swept up in corporate social responsibility and other messaging around sustainability, ESG, and impact investing. But don't let that overshadow the fact that your brand does need purpose.

And you need to take a step-back in recognition of the current environment and reflect on how this impacts your brand purpose moving forward. The future is a world of heightened collaboration and interconnectivity between you and your clients, so any 'client-centric' mantra needs to be re-imagined and the 'what's in it for me' rule book rewritten. But as the marketer, you must continue to articulate why your brand exists (its purpose).

If you can't, then how can you expect to matter to your clients? They'll turn to a competitor who does.

The purpose of Purpose

A successful brand needs to live by a guiding principle, or a set of them. They will frame the culture of your organisation, inspire your employees, guide your marketing, and attract and keep your clients. Together this creates your purpose – the very reason for your brand's being.

When well-articulated – in word and deed – purpose serves to bridge your brand to your clients. What you say to the world and how you treat all your stakeholders will remain as a constant measure of your value in their hearts and minds. But before you can pronounce your brand purpose, you must identify it, truly understand it, and weave it into the very fabric of every marketing piece you conceive.

In a post-pandemic world, expressing your purpose should consider these tenets:

- ▶ Simplicity and clarity win audience engagement
- ▶ Business-to-human communication demands authentic knowledge of your audience and their needs
- ▶ Differentiation is not about shouting the loudest – but being in tune with your clients as well as your employees.

Authenticity to create difference

It's also important to add substance to your style, to prove the reasoning behind your messaging, to ensure that your offerings are indeed relevant. At Living, the brand proposition work we do for clients looks for the values that drive decision-making and the intellectual capital that grounds the organisation. Once these attributes are deemed authentic, we collaborate with our clients to create difference – so that their brand purpose can rise above.

Is your brand purpose proving elusive?

Not ready or not sure how to move forward? That might be tough to admit, but transparency is a key ingredient to uncovering your brand purpose.

Living has been working with marketing teams for 16 years, helping them understand and express their brands. We know how to elevate the recognisable elements of a brand – its aesthetic identity – to a thoroughly realised incarnation of its purpose. We do this with solid intelligence: the data from research and the insights of in-depth discovery.

SET THE *RIGHT*

TONE



4 Does your tone of voice speak to your **BRAND VALUES?**

Setting the right tone for your brand

The annals of marketing history are just littered with well-intentioned campaigns and communications whose tone of voice missed the mark so badly, they led to brand backlash – even boycotts in extreme cases.

How is it that marketers – consumers themselves – can occasionally be tone-deaf?

It's often caused by crossed purposes: sales objectives, corporate mandates, executive egos... all losing sight of the one thing that matters most: the audience – the people you want listening to your message (and hopefully reacting positively to it as well).

Authenticity is the touchstone here, but it doesn't always answer the 'How?' and 'When?' questions that may arise at critical or unprecedented times. Like now.

Tone in the time of the coronavirus

The pandemic has challenged every well-meaning marketer navigating their brand through a global tragedy and economic disaster. For that matter, the pandemic has challenged every one of us setting out to craft any message – even an email. What is the proper tone?

We all have seen and shared many heartfelt messages of concern for people's safety, of pride and respect for the heroics of every person making an individual sacrifice. But where does a brand fit into this emotional dialogue?

The brands that are succeeding with their messages are those who remain genuine to the values they stand for. They know themselves completely. They know their audiences fully. And that knowledge sets the tone for their messaging: What to say, how to say it, and when to say it.

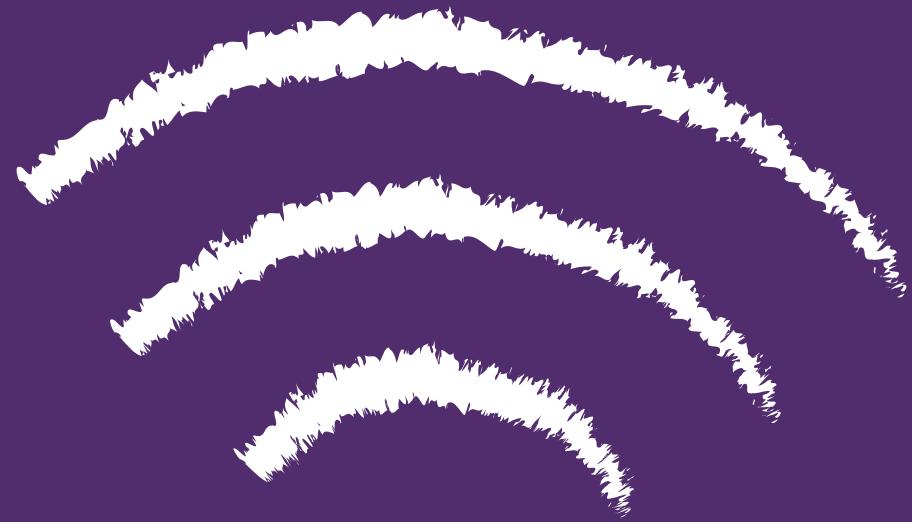
As an important brand attribute, tone of voice is not limited to crisis communications. It expresses your brand every day – from your ad campaigns to your social media posts, from your employee communications to your executive commentary.

And when your brand's natural tone is not right for unanticipated circumstances, you need to be prepared to pivot, switch gears, change the volume – but always in a manner that's true to your brand.

Easier said than done?

If you are not 100% confident in who your brand is, how can your audience hear the meaning of its message? And if you can't naturally articulate your brand's tone of voice, how can you expect to modulate it when you're faced with an unexpected situation?

For 16 years, Living has been working with established and emerging brands in the financial, professional services and technology sectors, helping them set the right tone of voice for their marketing. Conducting in-depth discovery workshops with clients and employees alike, analysing competitor communications, and applying data from our proprietary research on brand and digital intelligence, we help brands find their voice – and themselves.



MAKE *YOUR*
VOICE HEARD

5 Something worth shouting about: **VOICE SEARCH!**

Voice search is calling, are you home?

Once upon a time we imagined a future where we could talk with computers. We watched in awe as a fictional astronaut asked HAL to open the pod bay door. Today we can ask Siri to play a podcast. We can say “hey Google” and quickly find out the weather forecast. We can even ask Alexa for fund information from J.P. Morgan Asset Management and Putnam Investments. While we can’t yet experience the full A.I. interaction that Iron Man enjoys with Jarvis, voice activation is real and it’s here. What does it mean for your brand?

As part of the ongoing internet-of-things phenomenon, voice search is being driven by the ubiquitous ownership of voice assistants. More than 80% of households are expected to have at least one device by the end of 2021. And right now, nearly 25% of people are using voice search at least once a day. With so much of the world experiencing some period of ‘working from home’ during the pandemic, the adoption of voice search will only be accelerated.

Can you answer the call?

People can now have conversations with the brands in their lives – and when they ask a question, they expect an answer. Some marketers have begun to proactively revisit the structure and content of their websites to ensure that everything is properly tagged, that syntax is natural, and that new material is being conceived with voice search in mind.

Preparing your website for voice search is an extension – a tech-driven evolution – of search engine optimisation. The importance of SEO cannot be overstated. Since your web presence is effectively a tool for clients, prospects, resource partners and potential employees to learn more about you, you must make finding you an easy and intuitive exercise. There are various ways to improve

your rankings in search results, including H1 tags, page speed, and image compression, to name just a few.

The approach to preparing your website for voice search requires a concerted effort to strategically craft three key components: questions, content and tagging.

- ▶ The language on your website should be naturally phrased, anticipating how people will ask questions. More than 25% of voice search questions begin with ‘How?’ and ‘What?’
- ▶ Your content should be written with key search words in mind, especially superlatives like ‘best,’ ‘top,’ and ‘easiest.’
- ▶ Everything on your site should be tagged with descriptive or statistical metadata to facilitate search results.

This approach must be applied to the evergreen content as well as any dynamic content that may live only temporarily on your site. Lastly, you need to be sure to register your site with the major search engine services.

Speak up if you’re to be heard

Over 16 years, Living has helped companies in the financial, professional services and technology sectors stay ahead of the curve as new digital functionality has emerged. We collaborate with our clients to develop a user experience that leads to deeper, longer engagement that in turn leads to customer loyalty and richer relationships. We do this by conceiving and creating valuable online tools such as interactive dashboards and data consoles. We create standout websites that deliver an effective balance of functionality and content, supported with all the SEO tools needed to ensure a brand’s online presence cuts through the competitive landscape.

SEO

WHAT?

6 Revealing the *MAGIC* of SEO

An intuitive user experience and clear navigation are the best ways to ensure your prized content is read by visitors to your website... but how do you get visitors there in the first place? A Search Engine Optimisation (SEO) strategy is critical to the success of any brand's online presence. Do it right and you'll be at the head of the class, but do it wrong – or ignore it – and the results will be... well, that's the problem: there won't be any results.

SEO is all about driving your appearance on a search results page. Getting ranked on the coveted first page is increasingly competitive. SEO can be intricate, but by no means is it a dark art – it relies on doing the right things consistently and keeping search engines happy.

The goal of SEO is to provide search engines with a clear picture of what your website is about by demonstrating its popularity, relevance and usefulness. The more accessible your website is to Google, the better your content will rank.

How to conjure the right results

There are four key aspects to successful SEO, which are recognised as an ethical approach to web behaviour, and these are:

- 1 SEO alignment with your content strategy** – you must identify the right keywords, and it's smart to know what keywords are helping your competitors' rankings.
- 2 HTML coding** – you must ensure that titles, meta tags and microdata markups (Schema) are prevalent throughout your site.

- 3 Website architecture** – your website will be rewarded for being mobile-friendly and for having strong architecture, including a smart sitemap, fast loading-speed, safe connectivity, etc.
- 4 Ongoing optimisation** – you must embrace SEO as a standard operating procedure, one that permeates not just your evergreen and dynamic web content, but your blogs and social media posts as well.

There is no magic SEO formula and it does require ongoing management, but if you stay invested, the search engines will reward you.

Getting the formula right

As part of our annual Living Ratings research reports into brand and digital intelligence, we regularly review how SEO impacts a brand's search rankings. For 16 years, we've been helping our financial, professional services and technology clients develop effective SEO strategies. Like a good doctor visit, we provide the insightful diagnosis, the required medicine, and most importantly, the instructions for leading a healthy lifestyle – in which your website stays in tiptop condition and is in the best shape possible to achieve and maintain the Google page rankings you need.



A Search Engine Optimisation (SEO) strategy is critical to the success of any brand's online presence.

LET'S GET

TO KNOW

YOU

7

Brand value, measured in *HUMAN CAPITAL*

As more and more attention is being paid to your brand's digital presence, you can't afford to lose sight of the reality that your services business is founded on, driven by, and valued for its human capital. We live in a commercial world that has moved past the institutional anonymity of B2B, past the mass media of B2C, and on to the highly personalised B2H experience – business to human.

Even if yours is a business that focuses on companies and corporations, or NGOs and foundations, or factories and funds, you are still dealing with decision-makers who are individuals, people just like you. And what they want to know about your business is: you. Who are the people who drive your decisions? Who are the experts who deliver your services? What is the culture that nurtures your employees?

Tell your story

A winning digital experience for any brand involves a smart balance between content creation and web and social channel functionality. But what will differentiate your brand is how you tell your story – that is, the story of your people.

Surprisingly, websites, all too often, fail to offer interesting 'People' pages, showing instead only cold, sterile search functions of biographies written in the third person. It's a lost opportunity because these sections usually have the highest web traffic of interior pages. It's the place to celebrate your employees – which would catch the attention of people who want to do business with you and even come work for you.



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Give your people centre stage

Living has helped financial, professional services and technology companies shine a spotlight on their most valuable asset: their people. This begins with developing a brand positioning strategy that aligns with your firm's values and reveals the human relationships that exist within your value proposition. We look to highlight this 'human factor' of your firm by writing compelling first-person biographies, helping you plan reader-friendly blogs, crafting engaging social media posts, and designing webpages that deliver video, interactive and creative content – all this to draw upon the personalities of your team members.

By revealing the people behind the brand, your company becomes relatable, its purpose understandable, its message deemed authentic.

DISTANT
FROM

YOUR
SOCIAL

STRATEGY?

8

How social strategy **TRANSFORMS** brand experience

For brands in the financial and professional services industries, social media is no longer optional, it's a necessity. In the past, regulatory policy and compliance procedures often discouraged marketers from deploying social media as a means of connecting with their stakeholders. Today, however, constructive collaboration with compliance and legal colleagues empowers marketers to bolster the online brand experience for their audiences. The only obstacle now? The marketers themselves.

Kids in the candy shop

Social tech continues to pave the way for increasingly effective (and fun) ways to engage with your online visitors. But just because there's a new social media channel doesn't mean your brand should be on it. And what you do on the channels where you do belong, should not be a mindless rehash of the same content. Smart marketers should subscribe to the notion of repeat, reinforce and repurpose – but that doesn't mean regurgitate.

Social media content should be driven by an overarching strategy, supported by channel-specific strategies. And all that begins with the answers to these questions:

- 1** Who are you trying to reach?
- 2** What channels are they on?
(And critically: why are they there?!)
- 3** And what do you want them to take away from why they're seeing you on that channel?

Your just desserts

Our research for the three most recent Living Ratings reports (asset managers, professional services, law firms) reveals that less than half of the largest firms demonstrate a clear social media strategy. But those that do, are leading their sectors and reaping the rewards.

By pursuing an integrated, channel-specific, client-focused social strategy, you have the opportunity to improve online engagement, consumer sentiment and brand loyalty. Handled judiciously, you can express your brand values, distribute your thought leadership (where and when it's relevant), and amplify awareness of 'why people should care about your brand'. Social media ultimately succeeds as a people-to-people forum and a well-executed strategy will build the stage for your brand's human side – the very capital that clients and other stakeholders connect with.

Living helps clients around the globe succeed in the hyper-connected world of social media. From strategic planning to creative execution, we provide clients with the ideas, words and images – as well as the rules and best practices – to ensure lasting engagement.



Social tech continues to pave the way for increasingly effective (and fun) ways to engage with your online visitors.

IS IT **TIME** TO

**TRANS
FORM**

YOUR DATA?

Can your clients see the Big Picture behind *YOUR DATA?*

Content and interactivity, a royal marriage

Content is the self-proclaimed king – but he doesn't often worry about visitors to his castle! What's the best way to tell your story and deliver your content?

Marketers in financial and professional services firms are frequently challenged with distributing reams of complex information – they work for content factories after all. But their audiences don't want to sift through dozens of pages of white paper pdfs or boundless spreadsheets to understand the message.

A single image or graphic is worth a thousand words, but an effective infographic or a well-produced short animation or video can teach a lesson or express a point of view. That immediately raises the bar for content delivery. But, wouldn't you want to do an even better job of engaging your audience?

Enter the realm of interactivity

You might be the one with all the knowledge and insight to share, but it's your clients who truly rule the kingdom. And you can win their favour by empowering them with data visualisation and interactive tools.

When your story lives within data-heavy content, you can unleash it by allowing your clients to engage with that content and recognise for themselves the relevance of your purpose and perspective.



Marketers in financial and professional services firms are frequently challenged with distributing reams of complex information.

By creating a tool – be it a dashboard, a console, a matrix, etc. – you enable them to interact with your data and become part of their narrative. By using visualisation – colourful, animated, moving images – you capture their attention, win their engagement and helping is selling after all!

Keys to the kingdom

At Living, our designers and strategists have been working with global brands to develop useful and visually stunning tools that manifest data in creative expressions that can be quickly and seamlessly manipulated by their clients for customised results.

We help these brands surface the important datapoints of their content through an interrogative process that translates the most complex content into a compelling memorable experience. And the digital solutions we devise come wrapped in analytics, to provide the metrics that ensure your clients are dwelling on your website, delving into your content, and appreciating your brand at an even higher level. We do this whilst integrating these new tools within existing brand guidelines and website architecture.

CONTACT

If you'd like to discuss a new project for your brand, we'd love to hear from you.

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