

Rethink

THE CUSTOMER JOURNEY:
ASSET MANAGEMENT



JOURNEY STAGE:
Consideration



AUDIENCE:
Financial Advisors



SECTOR:
Asset Management

THE COMPLEXITY CHALLENGE

Financial advisors are time poor, yet crave insight. How can asset management firms best engage them?

J.P.Morgan
Asset Management

LinkedIn Marketing Solutions

Silver Award Winner - B2B

Financial Communications Society Portfolio 22 Awards 2016



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THE CHALLENGE

Financial advisors (FAs) are a notoriously difficult audience to influence. For asset management firms, this presents a considerable challenge.

How can asset management firms communicate when:

- FAs are insight hungry, but time poor and bombarded with information?
- the information they have to get across is complex?
- financial news is immediate but commonplace?
- the marketing objective is not about awareness, but deeper consideration?
- there is not a simple 'purchase' point, but it's about gaining a greater share of the wallet?
- there is not an individual purchaser, but a need to engage with the 'sphere of buyer influence'?

In 2015, J.P. Morgan Asset Management (JPMAM) sought to revise its digital strategy to re-engage FAs.

Partnering with LinkedIn Marketing Solutions: Financial Services, it utilized a multiproduct and multiplatform approach to position itself as a leader in the FA community.

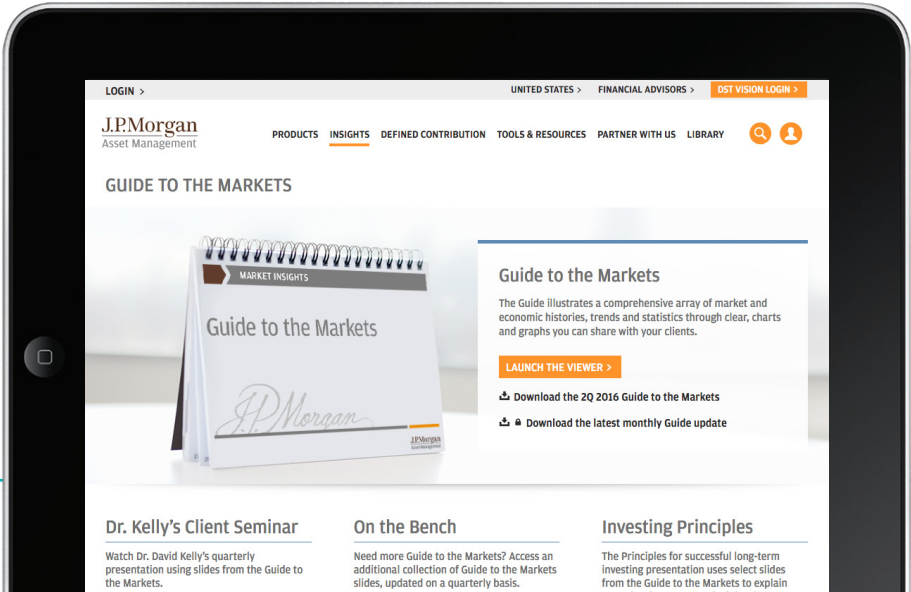
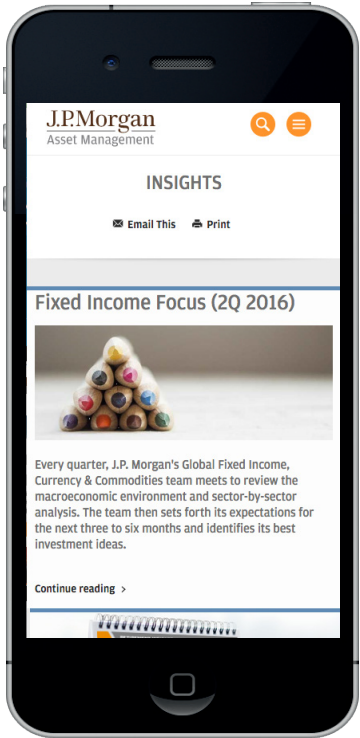
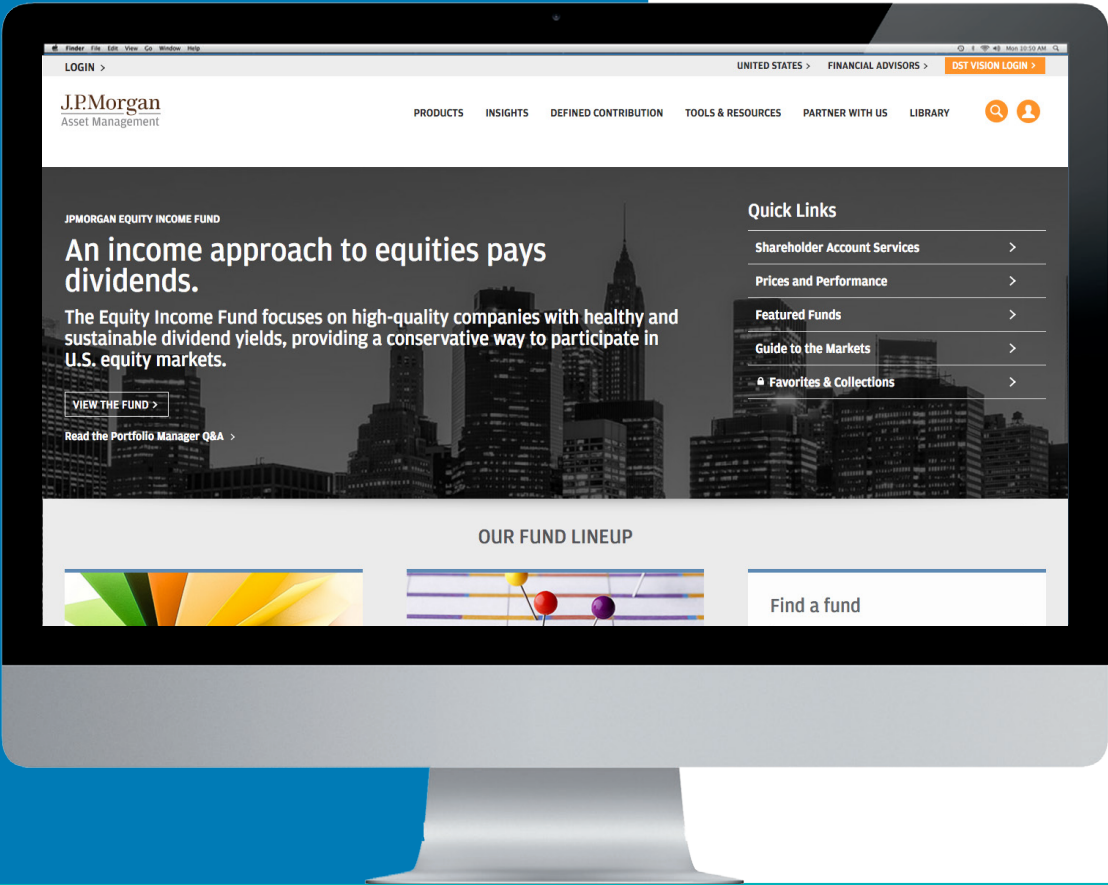
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CLIENT PROFILE AND
CAMPAIGN OBJECTIVE

JPMAM is a leading asset manager for individuals, advisors and institutions. With investment professionals located around the world, its strategies span the full spectrum of asset classes. As one of the world’s largest asset and wealth managers, it provides global market insights and a range of investment capabilities that few firms can match.

JPMAM’s proposition is to empower FAs to make better decisions on behalf of their clients.

By re-engaging its audience through deep, meaningful and actionable insights, JPMAM set out to provide the tools that would enable FAs to do their jobs to the best of their ability.





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THE TARGET AUDIENCE

“The top three priorities for financial advisors in 2016 are implementing goals-based investing, applying technology to increase workflows and efficiencies in their practices, and increasing client referrals.”

Investopedia, March 2016

FAs face their own set of challenges to keep up with ever-changing regulation, advancements in technology and market volatility.

The J.P. Morgan brand is well established, recognized worldwide for its wealth of knowledge and specialist expertise. Despite this, JPMAM felt there was an opportunity to further reach and engage FAs in a meaningful way.

Reaching out through LinkedIn

JPMAM worked with LinkedIn Marketing Solutions: Financial Services to identify key target segments of the advisor audience, in order to understand exactly how they react to content.

This approach enabled an understanding of the full sphere of influence to help JPMAM better position its products and services.

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THE CREATIVE SOLUTIONS

JPMAM wanted to find a way to target FAs with the right content at the right time to help them become better advisors and ultimately deliver larger portfolios.

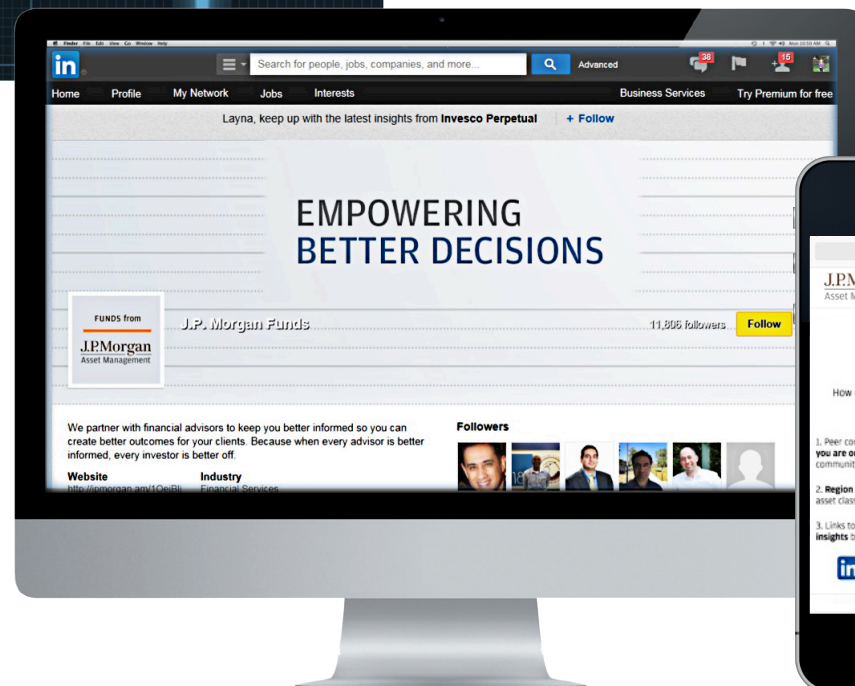
Bespoke solutions from LinkedIn

To provide actionable insight that would empower and equip them with the tools to achieve this, JPMAM looked to LinkedIn Marketing Solutions: Financial Services to develop innovative and customized solutions that were on the pulse of advisor engagement.

“We were seeking innovative ways to meet our FAs where they hang out in order to provide insights they need. And ultimately to empower better investment decisions.”

Jaime Kalfus, Global Head of Brand Experience,
J.P. Morgan Asset Management

Funds
specific
Showcase
Page



Application
Program
Interface

Application Program Interface

Combining key skills, creative experience and industry knowledge, JPMAM and LinkedIn Marketing Solutions: Financial Services designed, developed and launched a custom Application Program Interface (API) tool. Accessible through the JPMAM portal, the API experience gives financial advisors access to the content most relevant to them.

Funds specific Showcase Page

Utilizing Sponsored Content, combined with an 'always-on' content strategy, JPMAM was able to deliver a consistent stream of actionable content to FAs, leading to growing engagement and consistent performance. To drive this content, JPMAM created a 'Showcase Page' on LinkedIn which has become a hub for the top performing *Guide to the Markets*.

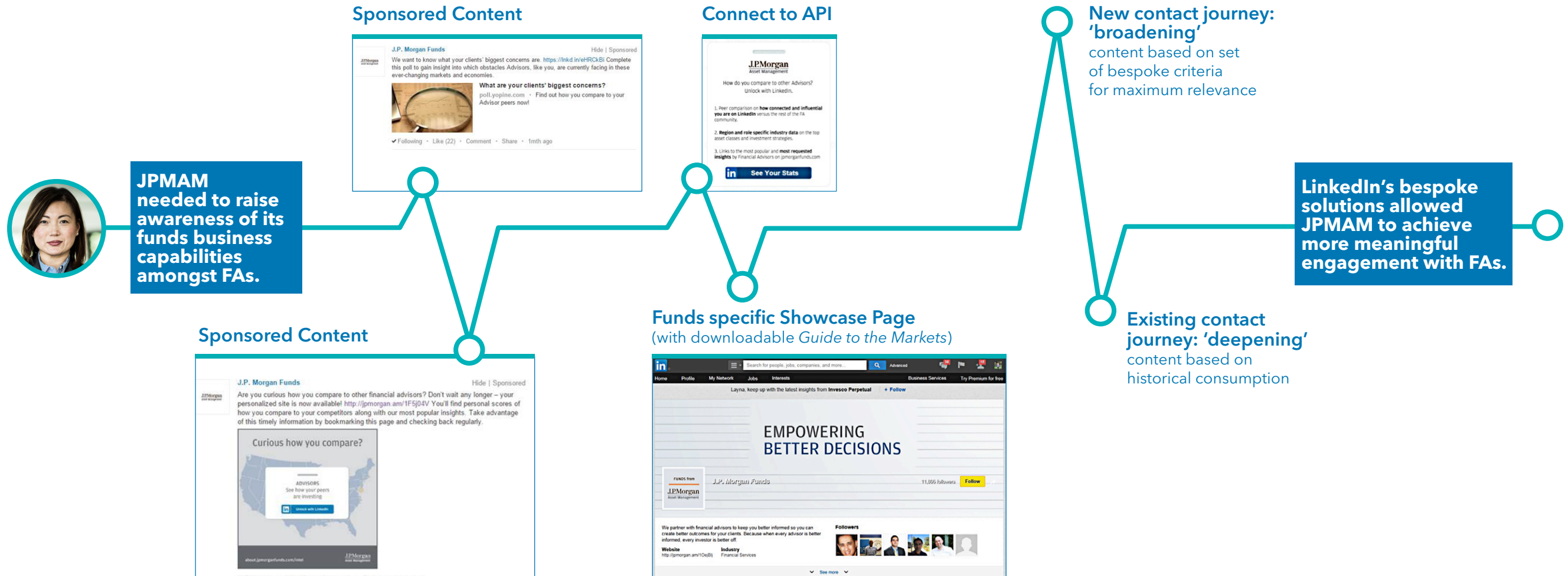
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THE CUSTOMER JOURNEY

To both broaden and deepen relationships with the FA community, engagement was phased with key trigger points around the moments that matter most. Utilizing Sponsored Content (which reached directly into the LinkedIn feed), along

with the API, the Showcase Page and tailored customer journeys, JPMAM was able to deliver a consistent stream of relevant, actionable content to FAs across the world and build relationships at all levels.



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THE RESULTS

By partnering with LinkedIn Marketing Solutions: Financial Services in the creation, development and implementation of a refreshed, multidimensional digital strategy, JPMAM was able to tailor content for its current FA contacts and engage with a whole new audience of advisors.

The approach has resulted in JPMAM creating a differentiated experience for FAs at all levels and has played a significant part in driving the business forward. It has also positioned and maintained JPMAM as an industry leader within the FA community.

“The combination of J.P. Morgan Asset Management’s insights with LinkedIn’s ability to granularly reach our target audience proved to be a winning combo that led to the highest quality engagement.”

Kevin Hale, Vice President, Global Brand Experience,
J.P. Morgan Asset Management

Silver

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20%

increase in conversions
on the JPMAM site



49%

US-based FAs receiving
Sponsored Content



Tenfold

growth in FA followers of Showcase
Page, with more than six times as many
followers from other professions



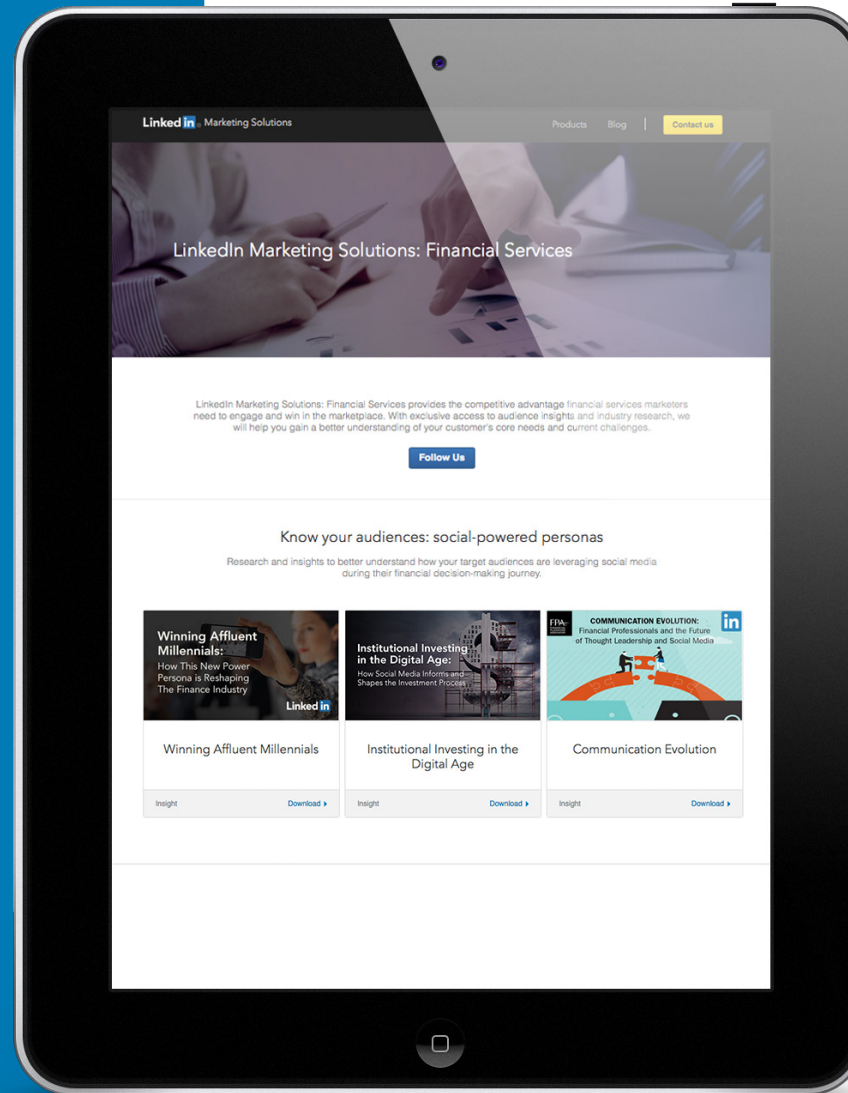
200%

engagement rates compared
to platform benchmarks



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HOW LINKEDIN CAN HELP YOU RETHINK YOUR CUSTOMER JOURNEYS

At LinkedIn Marketing Solutions: Financial Services we aim to partner with financial brands to help them rethink their customer journeys.

We can do this through:

- **Our Platform:** Offering scale as well as granularity to provide deep insight into your clients and their life journeys.
- **Marketing Solutions:** Driving deeper engagement with personalized, compelling and 'always on' content matched to each stage of your customer's journey.

Get in touch through the contact details overleaf to find out more about how LinkedIn Marketing Solutions: Financial Services can help you rethink your own organization's customer journey and connect you to the audiences and issues that matter most.

CONTACT US

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<https://business.linkedin.com/marketing-solutions/financial-services?u=0>

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ABOUT LINKEDIN | LinkedIn connects the world's professionals to make them more productive and successful and transforms the ways companies hire, market and sell. Our vision is to create economic opportunity for every member of the global workforce through the ongoing development of the world's first Economic Graph. LinkedIn has more than 433 million members and has offices in 30 cities around the world.

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