



## Case Study - Financial Services/Insurance

How do you help a 20-year-old annuity product capitalize on its stability?

*By exposing its greatest assets.*

### Situation

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Lincoln Director, a group annuity product, had managed to weather varying economic conditions for nearly 20 years and remain profitable, even though it had been left “unattended” among the company’s portfolio of retirement products.

The strategic direction of the company was changing, and the Director was about to become a lead product. But before doing so, it was imperative to have a clear understanding of the Director’s strengths, and ultimately its ability to survive varying business conditions.

### Objective

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To identify the primary attributes responsible for the Director’s success.

### Brand Strategy

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Through a fact-finding Discovery Session, we helped the Director team unearth the key facts responsible for its success. What became evident during the session was the idea that the Director was highly flexible and scalable...its soon-to-be claim of distinction.

But, what did flexibility and scalability really mean? It meant that the Director product was able to deliver with virtually unlimited pricing, and extensive investment and servicing options—all backed by great customer service.

As a result, the tagline “Designed to deliver” would carry the unifying message of the brand. It had the ability to resonate with all Director audiences—financial advisors, plan sponsors, plan participants, and TPAs. And it provided a clear and defining reason for people to choose the Director product.

### Brand Essence & Adoption

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Friendly and inviting brand visuals were developed to convey a flexible brand that was “Designed to deliver.” A “key attribute” graphic appeared on all materials to emphasize the Director’s virtually unlimited combination of investments, service, and pricing options. And, all marketing materials were evaluated to insure they “delivered” on the brand promise in form, function, and content.

As for the messaging, a unique story was crafted using the many facts unearthed in the Discovery Session. In addition, all headlines began with the word “delivering” to reinforce the Director’s claim of distinction.

A comprehensive Brand Standards Guide was created to ensure consistency for all marketing materials, sales presentations, and correspondence. It outlined the look and feel, and tone and manner, of the brand, and supplied all fonts, photographs, logos, and layout templates. This ensured consistency for all materials developed by Lincoln’s internal communications departments and external creative partners.

Awareness and recognition programs helped employees embrace and better understand the Director brand and how to deliver the brand experience—resulting in increased employee morale. The Director enjoyed better plan retention along with record sales and assets.



# DIRECTOR<sup>SM</sup>

Designed to deliver.

