



**TITLE OF CASE STUDY:** Providing Superior Guidance and Navigation to Investors:  
Fidelity Investments' Green Line Campaign

---

## **BUSINESS SITUATION**

### Market Conditions

Few predicted the magnitude of the 2007-2009 financial collapse and the impact it would have on investors. Many investors who had relationships with Fidelity Investments, as well as those who had relationships with other financial firms, became increasingly conservative in their approach to investing and many transferred their assets out of equities to avoid market volatility.

### The Evolving Investor Mindset

Fidelity was founded on the idea of meeting the needs of the self-directed investor – the person with a working knowledge of investing and personal finance and who wanted to make his or her own investment decisions. During and after the market conditions of 2008 and 2009, an increasing number of previously self-directed investors now preferred to discuss and validate their investment ideas with a trusted professional before making investment decisions.

### Competitive Landscape

Investors sought investment companies that they could trust and work with and who could understand their specific, personal financial needs. In that environment, Fidelity's goal was to develop a campaign that would deliver a resonant brand message – one that was true to Fidelity's strong belief in the benefits of long-term investing and sticking to a financial plan throughout market cycles and one that could also break through the competitive messaging clutter. With that in mind, the following goals were established for the rebranding effort.

## **PRELIMINARY CAMPAIGN OBJECTIVES**

- 1) Reconfirm Fidelity's core brand idea, ensuring that it:
  - Effectively communicates that Fidelity can meet the lifetime needs of investors seeking guidance
  - Differentiates Fidelity from competitors
- 2) Develop a cohesive, integrated brand campaign
- 3) Identify measures of success

## **FINDING THE CORE BRAND IDEA**

As a first step in the development process, multiple brand positioning statements were created to reflect different aspects of the business and the variety of customer benefits it delivers. A cross-functional working team sought input from across the organization. Messages were crafted that connected with Fidelity's leadership as a retirement services provider, its customer success, lifetime financial solutions, and world class products, research and service. With these messages and support points developed, it was time to embark on the first phase of research.

### **Brand Positioning Exploratory**

The main objective of the exploratory was to evaluate brand positioning concepts and a set of messages to inform the core brand idea. Research was conducted among investors of various ages and investing styles.

#### **Key Findings:**

- Investment advice/guidance was of critical importance to investors.
- “Lifetime solutions” from a financial partner who can help at every stage of life was universally appealing
- The ability to offer excellence in products and services was essential

The major insight was that investment guidance appealed broadly, resonating with all investors. Guidance and partnership were key Fidelity brand traits in a market where investors were seeking more investing help.

### **Brand Positioning Concept Testing**

Fidelity's core brand idea quickly emerged: *“With Fidelity, you get a financial partner who can help you at every stage of your life. You'll have the people, recommendations, and investments you need to get on track and stay there — today and throughout your life.”*

Furthermore, research showed that Fidelity was uniquely well-positioned to be an investor's financial partner at every stage of life—no competitor offered the same breadth and depth of high quality services.

### **BRINGING THE BRAND IDEA TO LIFE**

Among the campaign objectives and success measures were:

- 1) Support the business as it sought to expand its investment guidance offerings.
- 2) Support the business as it sought to further increase customer satisfaction and loyalty.
- 3) Expand consumer awareness of Fidelity's personalized financial advice and guidance.
- 4) Increase unaided awareness of Fidelity's new brand campaign.

The campaign sought to establish Fidelity as the nation's financial navigator - the one financial services company able to help you create a personalized, realistic plan to help you reach all of your life goals. The concept was similar to that of a GPS device, which many think of as providing trustworthy, helpful, flexible, “at your service/there when you need it” service. To visually illustrate how Fidelity partners with customers to meet their goals throughout their lives, a simple, iconic green line was employed. To accompany this visual identity, Fidelity sought a tagline focused on the investors' need for guidance and one that would connect to the GPS-like theme.

### **Advertising, Copy, and Tagline Evaluation**

Once advertising concepts were developed, customer interviews helped assess their effectiveness, relevance and uniqueness.

#### **Key Findings:**

- The campaign positively conveyed the concepts of guidance and personalized help, with Fidelity as an investor's lifetime financial partner
- The green line effectively communicated the concept of a financial path that one could follow to achieve one's goals

- The message: "Whatever your destination, Fidelity provides the people, the guidance and the investments to help you find your way." reinforced the overall concept of providing personalized help throughout life, and provided more specifics about "how" Fidelity can help
- "Turn here," as a tagline, together with the Fidelity logo unified the message by connecting to the concept of a direction or path that one could follow by turning to Fidelity

"Turn here" also serves as a reminder that Fidelity is a trustworthy company one can turn to for help, and it also encapsulates how Fidelity works with customers to create a personalized financial plan designed to be specific, instructive and effective.

### **Pre-Market Copy Test**

To evaluate the messaging for the campaign as a whole, Fidelity conducted an online survey of investors, which resulted in further refinements to some of the test advertisements.

Following these refinements, the Green Line campaign hit the market in March of 2009.

### **GREEN LINE CAMPAIGN**

Fidelity launched four new TV spots in mid-March 2009. The spots aired on NBC's Nightly News, and appeared in 17 of the 19 NCAA tournament games during the weekend of March 21-22. The television launch was complemented by online ads on AOL, Forbes, Washington Post, MSNBC and Yahoo! Finance.

Print ads designed around specific financial lifestages were placed within related editorial content.

Bringing the idea to life through media: Having a compelling and ground breaking creative campaign was one step, conveying its message to investors in a busy, competitive media landscape was equally important

The media strategy included:

- 1) Creation of a consumer roadmap that connected to investors
- 2) Connecting the concept of GPS-like financial guidance to relevant content

Consumer Roadmap: The media plan focused on investors' lifestyles and passions, which resulted in the green line's being integrated as a guide along an investor's daily journey - on their iPad, at the airport, on the golf course or on the ski lift.

Media GPS: The green line was integrated as a visual device within certain broadcasts, for example, it was used as a device used to diagram the analysis of a play in football (Sunday Night NFL on NBC), forecast the slope of a putt in Golf (across all major PGA events on ESPN), capture the speed of a serve in tennis (across all major events on ESPN), replay a full run in skiing (the Winter Olympics on NBC), and track the pitches in an at bat in baseball (during the MLB Playoffs on Fox). Elsewhere, the green line became a Table of Contents in *The Week*, a guide to top museums in *Smithsonian* magazine, and a tee-to-green guide in *GOLF* magazine.

### **In-Market Measurement**

Within a few months, it became clear that the new campaign was very powerful. The Green Line concept was memorable, and was a strong and effective metaphor that conveyed guidance and a path from Fidelity that investors could follow to help reach their financial goals.

Later in 2009, Fidelity unaided advertising awareness and brand awareness were both high and the campaign's core message, that Fidelity can provide lifelong personal guidance to help investors achieve their financial goals, was coming through strong and clear.

### **BUSINESS RESULTS**

[Among the results of the campaign were increases in unaided advertising and brand awareness, and in the number of customers receiving guidance from Fidelity. There was also a stronger consumer perception of the firm as a provider of lifelong financial guidance and solutions. One further reflection of the campaign's success was an independent advertising research report, which ranked Fidelity's brand television ads among the top 5 best investment services ads for eight consecutive months in 2009.](#)