



# The formula for trust in a digital-first marketing landscape

AFM Marketing Forum

21 June 2023

---

Marketing material for professional clients only.

Beth Saint

---

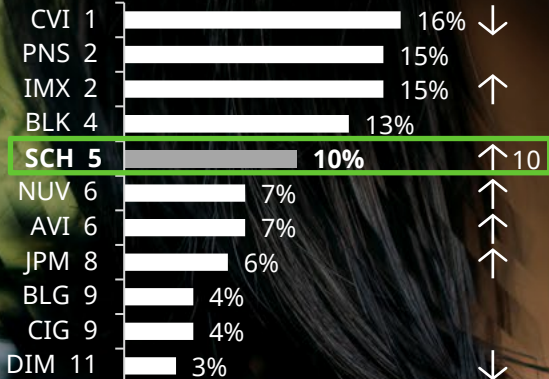
Global Head of Marketing and Communications

# BEYOND PROFIT

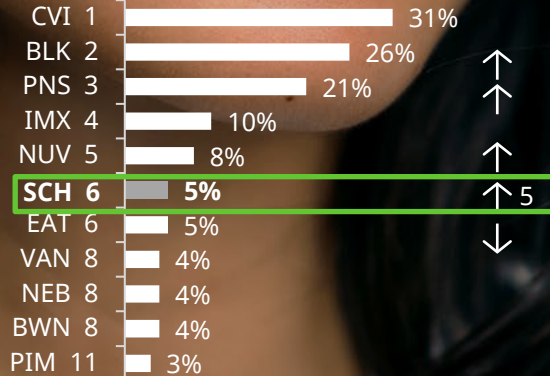
Beyond Profit launched in March 2021 across 35 countries in 24 languages. It has shaped every aspect of Schroders' global marketing activity, from a brand identity refresh, website redesign and new global advertising campaign – to a more advanced social media strategy with content publishing at its heart. It has also fundamentally changed the way Schroders operates at every level of the business – from how employees are trained to interact with clients, to how Schroders reports on fund performance.

## US ESG BRAND RANKING 2021

### INSTITUTIONAL ESG [68]



### RETAIL GATEKEEPER ESG [77]



# 352%

increase in website traffic  
year-on-year\*

# 6.1m

video views in the UK alone  
with 55% completion rate\*

# 64%

of visitors to schroders.com  
were new visitors\*

# 12x

increase in video content views\*

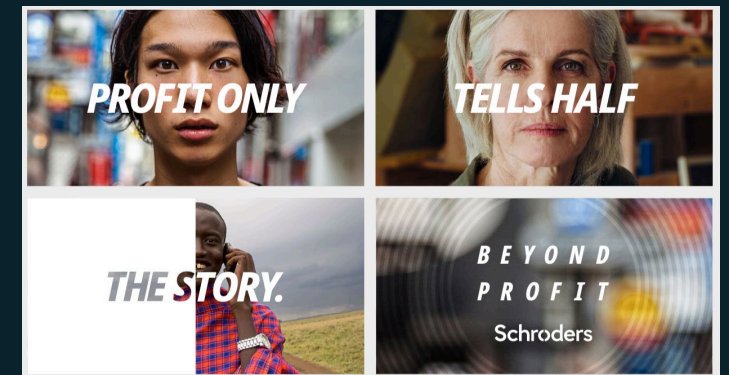
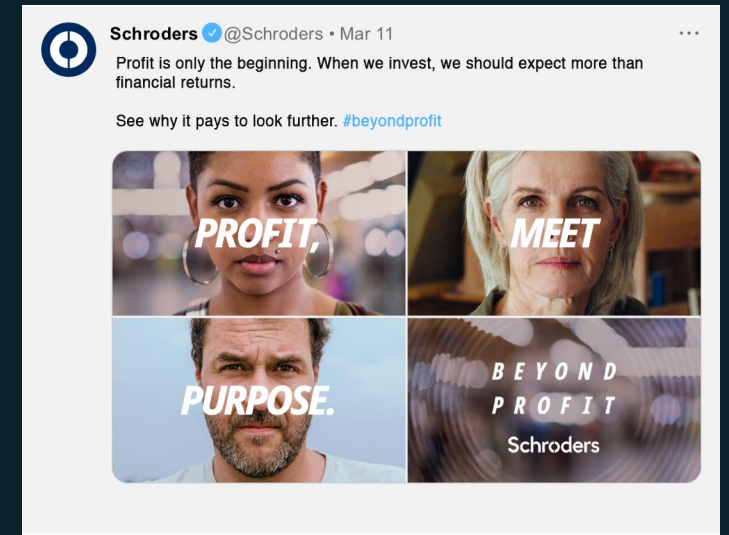
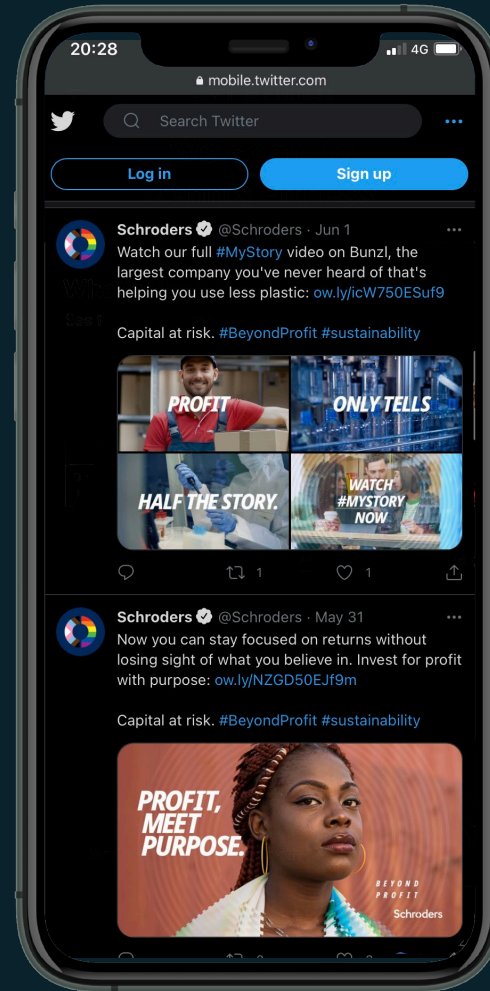
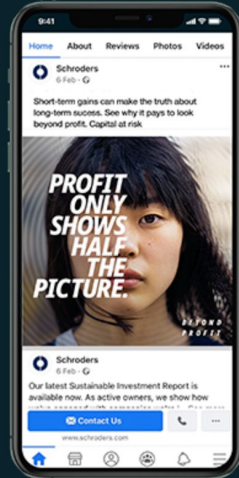
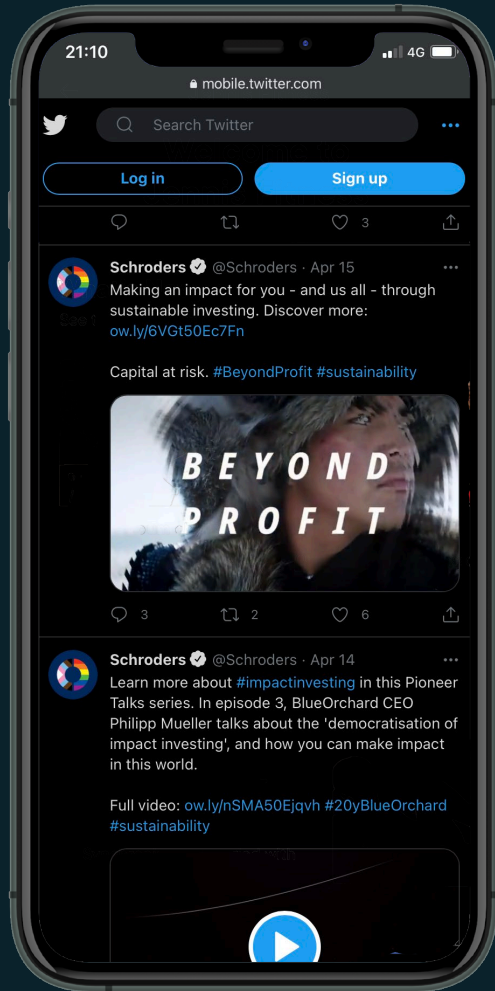
# 3x

increase in dwell time for  
sustainability content\*

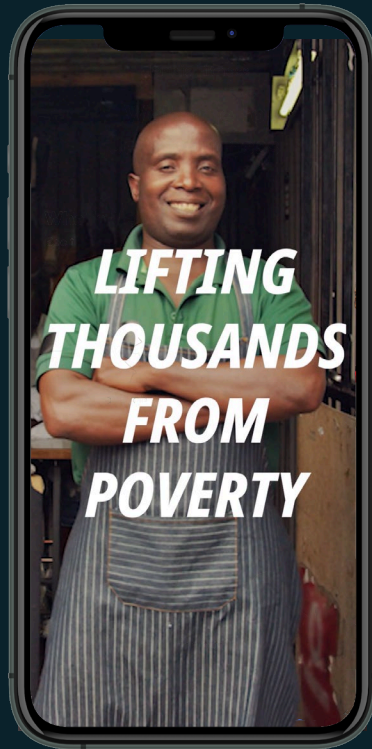
# 4x

higher clickthrough rate than  
industry average for Instagram\*

# BEYOND PROFIT CAMPAIGN OVERVIEW – SOCIAL MEDIA



BEYOND PROFIT CAMPAIGN OVERVIEW – VIDEO CONTENT





# IS A COMPANY WITH HIGH EMISSIONS WORTH BACKING?

Companies that cut their carbon emissions stand to become more resilient to climate risks, and more commercially successful over the long term. As active owners, we continue to engage with companies on the investment issues that matter.

Schroders

**Your capital is at risk with investing.** Marketing material. Issued by Schroder Investment Management Limited, 1 London Wall Place, London EC2Y 5AU. Registration No. 1893220 England. Authorised and regulated by the Financial Conduct Authority.



## **ARE STAFF BENEFITS GOOD FOR THE BOTTOM LINE?**

Staff benefits have a meaningful influence on whether people accept a job offer – which makes them a decisive factor in the war for talent and long-term business performance. As active owners we continue to engage with companies on the investment issues that matter.

Schroders

**Your capital is at risk with investing.** Marketing material. Issued by Schroder Investment Management Limited, 1 London Wall Place, London EC2Y 5AU. Registration No. 1893220 England. Authorised and regulated by the Financial Conduct Authority.

# Marketing and Communications at Schroders

## Mission and vision statement



### Our vision

To become the best-in-class Marketing and Communications organisation in Asset & Wealth management globally

1

Delivering tangible business value through the prospecting, acquisition and retention of clients

2

Leading brand in all the markets we serve

3

Delivering delightful omnichannel experiences

4

Powered by data and client insights

5

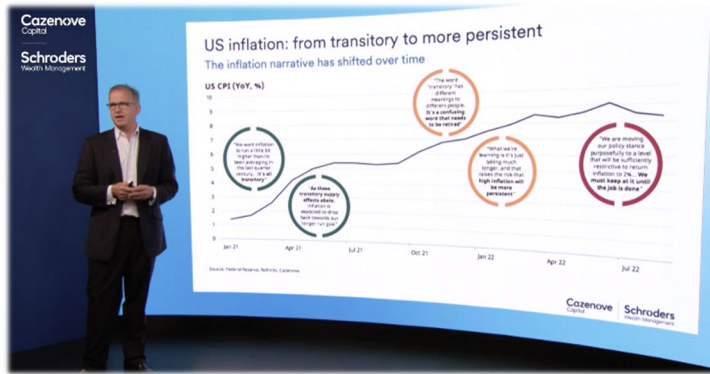
Empowering our people to take personal responsibility for the delivery of team goals



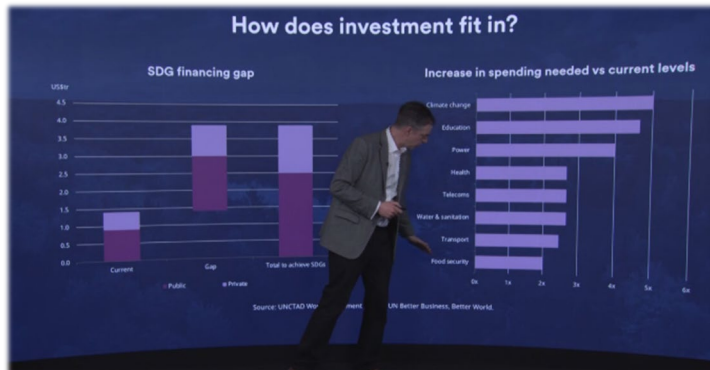
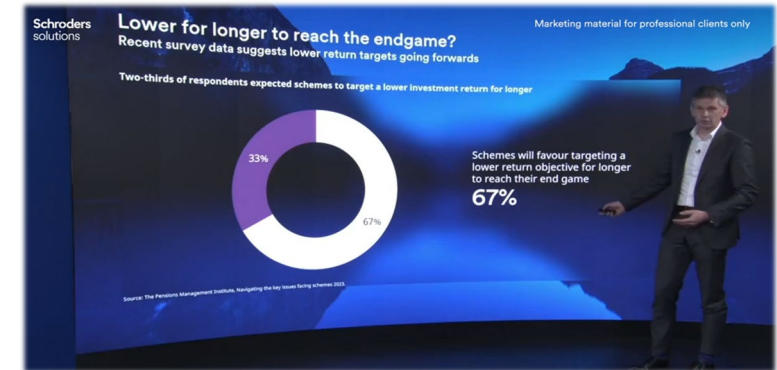
### Our mission

Deliver **high quality and relevant content** through various **communication channels** to **engage and inform** clients and prospects with the objective of driving **customer acquisition, retention** and ultimately **business growth**

# Evolving our content delivery to meet client demand



When we launched our state of the art Media Centre, we were using the LED wall either as a backdrop, or to project PowerPoint presentations.



We are now delivering a weather forecast / election night experience



# Delivering with purpose and intent

How we align customers' sales journey with Active Ownership campaign

Stage in the funnel	What we want the audience to do	Components
---------------------	---------------------------------	------------

**AWARENESS**



Be aware of how active ownership issues are material to investments

- Display adverts
- Media coverage
- Email
- Owned articles
- Video
- Podcast
- Social posts
- One-pager
- Internal comms (i.e. presentations)

**ENGAGEMENT**



Understand Schroders' approach to active ownership and how it benefits investors

- Webpages
- Owned articles (case studies)
- Videos (case studies)
- Social posts
- Emails
- Search ads

**CONSIDERATION**



Find out more / Contact us

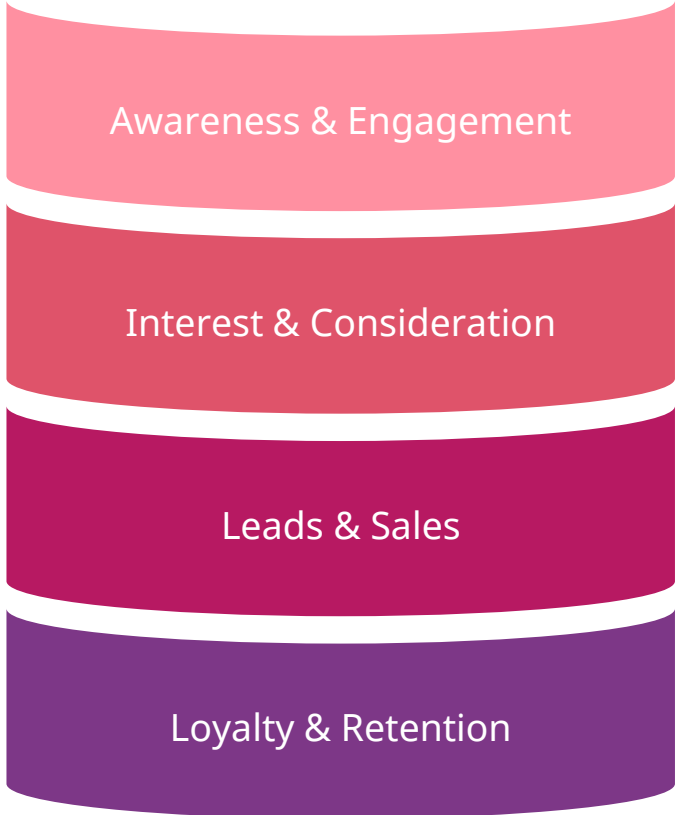
- Contact us form
- Sales aid

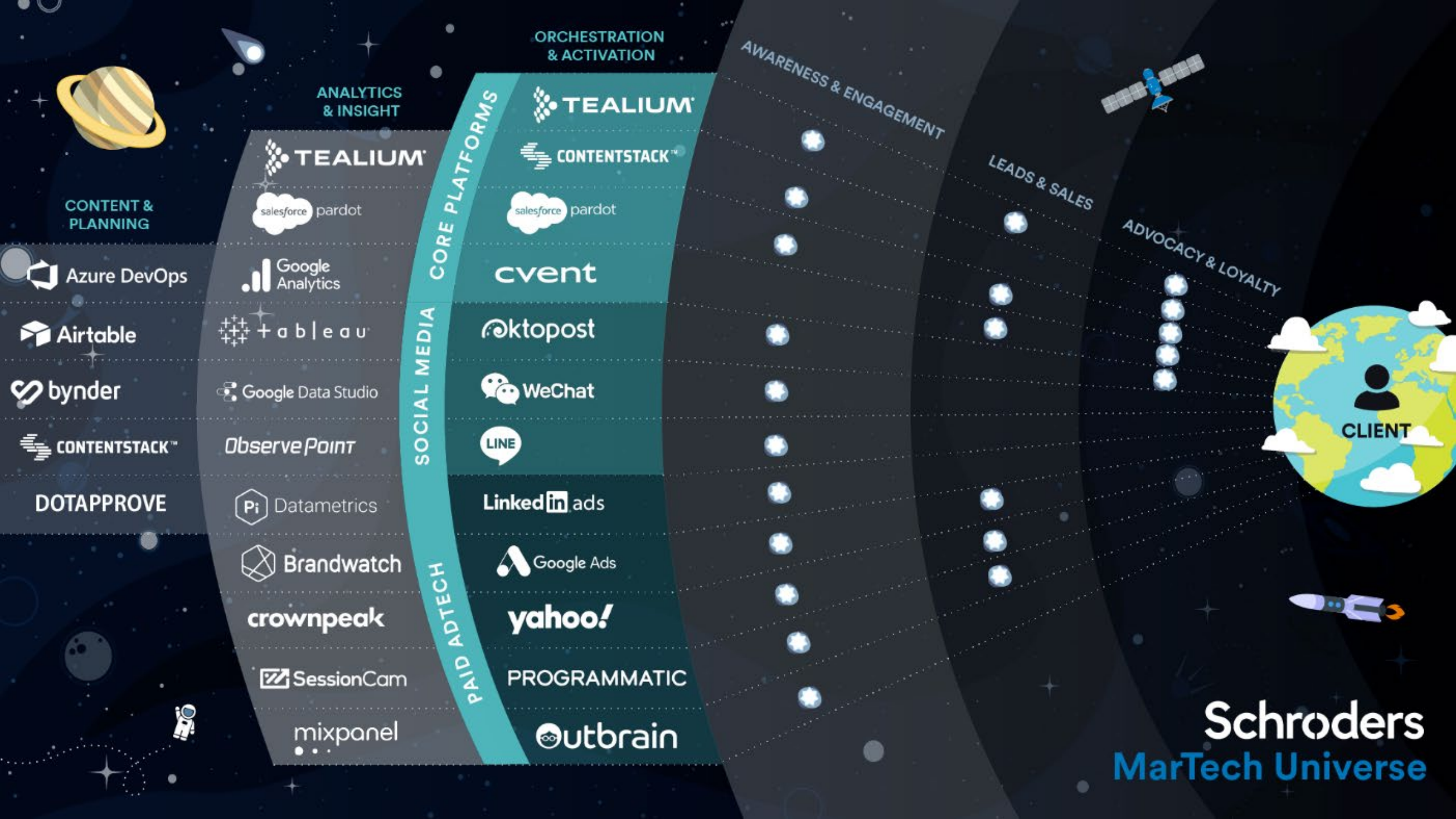
# Setting KPIs against objectives

## Determine your objective

## Aligned to the marketing funnel

Metric	KPI
<ul style="list-style-type: none"><li>• Insights pageviews</li><li>• Email article click rates</li><li>• Social engagement</li></ul>	Visibility and readership of our content across channels
<ul style="list-style-type: none"><li>• UQL's generated</li><li>• Improvement of event attendance rates and AUM addressed</li></ul>	Prospects showing propensity for particular products/topics
<ul style="list-style-type: none"><li>• UQL to MQL conversion rate</li><li>• MQL to SQL conversion rate</li></ul>	Number of leads generated linked to Marketing campaigns
<ul style="list-style-type: none"><li>• % of clients 'at risk' actively engaged</li><li>• £X billion of assets addressed through campaign targeting</li></ul>	Highly value clients engaging with content and campaigns





# Important information

## **Marketing material for professional clients only.**

The material is not intended to provide, and should not be relied on for accounting, legal or tax advice. Reliance should not be placed on any views or information in the material when taking individual investment and/or strategic decisions. No responsibility can be accepted for error of fact or opinion. Any references to securities, sectors, regions and/or countries are for illustrative purposes only and is not a recommendation to buy and/or sell.

**Past performance is not a guide to future performance and may not be repeated. The value of investments and the income from them may go down as well as up and investors may not get back the amount originally invested. Exchange rate changes may cause the value of any investments to rise or fall.**

Schroders has expressed its own views and opinions in this document and these may change.

This information is not an offer, solicitation or recommendation to buy or sell any financial instrument or to adopt any investment strategy. Nothing in this material should be construed as advice or a recommendation to buy or sell. Information herein is believed to be reliable but we do not warrant its completeness or accuracy.

Any data has been sourced by us and is provided without any warranties of any kind. It should be independently verified before further publication or use. Third party data is owned or licenced by the data provider and may not be reproduced, extracted or used for any other purpose without the data provider's consent. Neither we, nor the data provider, will have any liability in connection with the third party data.

Schroders will be a data controller in respect of your personal data. For information on how Schroders might process your personal data, please view our Privacy Policy available at [www.schroders.com/en/privacy-policy](https://www.schroders.com/en/privacy-policy) or on request should you not have access to this webpage. For your security, communications may be recorded or monitored.

Issued in June 2023 by Schroder Investment Management Limited, 1 London Wall Place, London EC2Y 5AU. Registered in England, No. 4191730. Authorised and regulated by the Financial Conduct Authority.