

SAVVY INVESTOR PRESENTS

The Marketing Response to Coronavirus Award

In collaboration with

WHITE MARBLE



INVESTMENT MARKETING TOOLKIT

It's often hard to find resources exclusively for investment marketers. Savvy Insights provides tips, trends, and best practices specifically for marketers targeting institutional investors.

Our **Content Marketing Survey and Forecast** includes data, key learnings with practical advice, upcoming content trends, and hot topic forecasts – tools to keep your audience engaged and you ahead of the game.

[CLICK HERE TO VIEW REPORT](#)

FROM

Savvy Insights

Powered by Savvy Investor



Savvy Investor is the world's leading knowledge network for institutional investors. Our focus is on enabling pension funds and professional investors to improve their processes and to do their job better.

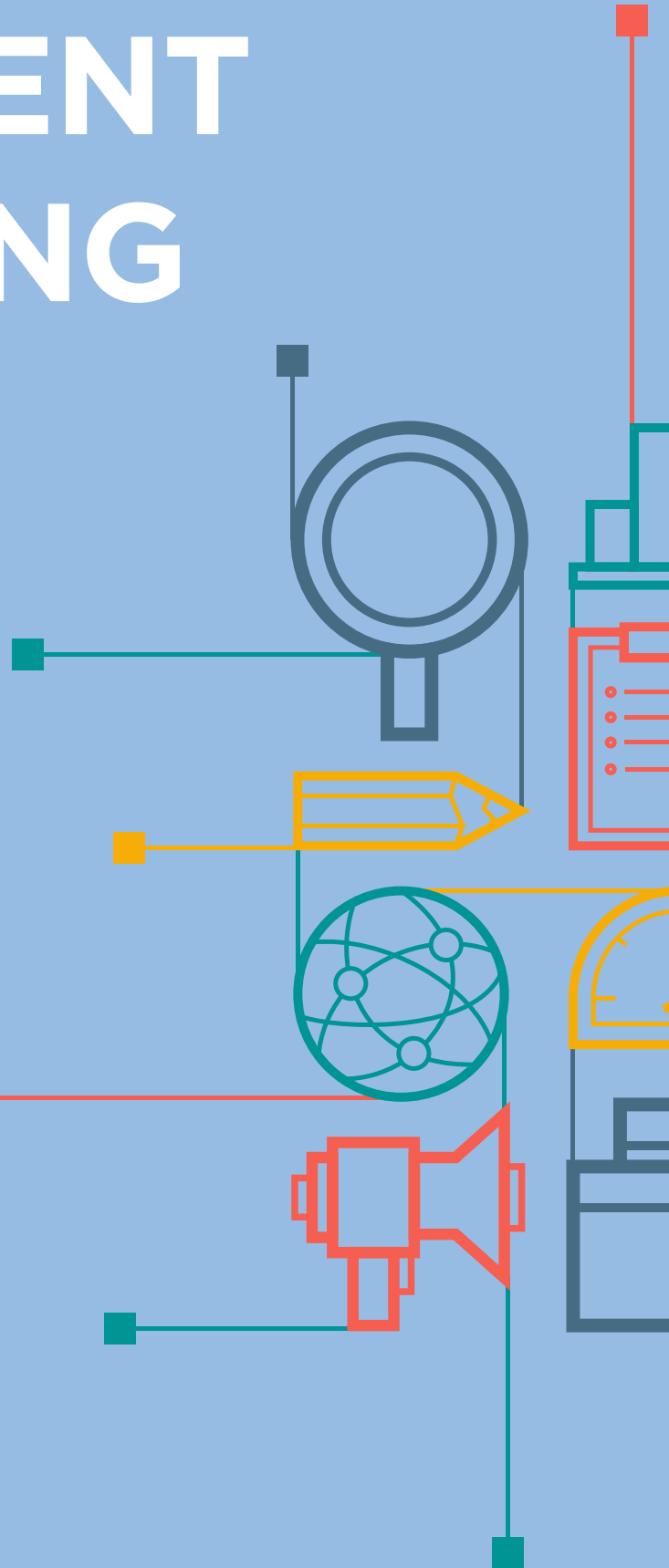


Table of Contents (Click to view)

04 A NOTE FROM SAVVY INVESTOR'S CEO
A big thanks to all who applied, a look back at 2020, and an outline of our plans for a positive 2021

05 ABOUT THE AWARDS
The reasoning and method behind the Marketing Response to Coronavirus Award

07 AWARD WINNERS
Revealed: Our winning and commended content and marketing teams

08 MEET THE JUDGES
Our judging panel comprised of judges from both Savvy Investor and White Marble Marketing

10 MFS INVESTMENT MANAGEMENT
Showcase and scrapbook pages including insight from the judges and an exclusive interview

18 COLUMBIA THREADNEEDLE INVESTMENTS
Showcase and scrapbook pages including insight from the judges

24 JANUS HENDERSON INVESTORS
Showcase and scrapbook pages including insight from the judges

30 ABOUT SAVVY INVESTOR
Find out more about Savvy Investor and view our Special Report Editorial Schedule

WHITE MARBLE

About White Marble Marketing

White Marble Marketing is the home for best practice in investment marketing. Covering core practice areas of consulting, learning, and measurement, WMM aim to transform marketing into a more strategic, educational, and measurable function of the investment industry. We help clients to resource and deliver their marketing projects; develop ambitious marketers at all levels through our programmes, learning opportunities, and supportive community; and underpin this activity with performance data from our industry benchmarking tool Metrologis.

accredited by



2020 Update With Savvy Investor's CEO



Celebrating Marketers

It's always a great privilege to host the Savvy Awards, but this year's new addition – the Marketing Response to Coronavirus Award – has been both fascinating and inspiring. We've heard about how marketing and content teams threw initial 2020 plans out of the window, we've learned about innovative responses and campaigns, and we have thoroughly enjoyed meeting some of the shortlisted candidates to learn more.

Thank you to all who submitted and well done to every marketer in what was a hugely challenging 2020. It's also been brilliant to collaborate with White Marble Marketing, who've added great expertise, knowledge, and experience to our judging panel.

2021: Looking forward with optimism

When I presented our 2020 vision to staff at the end of last year, none of us could have imagined the unique challenges and opportunities that this year would bring. This wasn't the way 2020 – that iconic date – was supposed to unfold. The term '2020 vision' speaks of clarity and progress, but instead it was a year of uncertainty and trouble, with the global economy in retreat and our lives fundamentally changed.

For Savvy Investor, our agility has made for another good year. 2020 has been full of milestones. We celebrated our five-year anniversary and surpassed 50,000 members. Over the year our content team uploaded over 10,000 articles and papers, which have had over 900,000 views. We now have more than 20 staff, all of whom have adjusted well to remote working. We realised very early in the year that an extended period of homeworking was going to be necessary, so by the time lockdown was announced, all

staff had access to laptops and dual screens to enable them to work from home. The transition was smooth – so much so that a flexible working regime will be a permanent fixture for Savvy Investor staff post-pandemic.

We are optimistic on the outlook for 2021, and all that it will bring.

At a company level, plans are well underway for the relaunch of our website, expected later this year. And we have many other exciting projects taking place behind the scenes, designed to improve our service to members and partners alike. Please use the email below to contact me if there are developments that you'd like us to consider in order to improve our service to you.

Finally, I'd like to take this opportunity to publicly thank all of our staff for their hard work and dedication last year. We are blessed to have a great team of people whom I hold in the highest regard. And I must thank you – our members, readers, and partners – for journeying with us. Be assured that we'll be doing our utmost to bring you more great content and to exceed your expectations in 2021.

Stay safe and congratulations to all who have won awards this year!

A stylized, handwritten signature of the name 'ANDREW' in black ink, with a horizontal line underneath.

ANDREW PERRINS
CHIEF EXECUTIVE, SAVVY INVESTOR
andrew.perrins@savvyinvestor.net

WHY WE CREATED THE MARKETING RESPONSE TO CORONAVIRUS AWARD 2020

The coronavirus pandemic has brought unprecedented disruption and sadly, tragedy, to the lives of millions around the world. With significant market volatility, remote working as our new normal, and several vaccine rollouts promising to kick-start the global economy in 2021, the investment management industry has had to adapt too.

Savvy Investor's **Marketing Response to Coronavirus Award** celebrates the content and marketing teams who adapted to these rapid changes with stellar creativity, tenacity, and teamwork.

Marketers are so often the unsung heroes in an investment firm. Short deadlines, complex compliance approvals, and tighter budgets are just some of the daily challenges. But when faced with shifting market dynamics and changing client needs, marketers are key in ensuring that

businesses are doing whatever they can to keep clients engaged, up to date, and informed.

We believe that the circumstances all marketers faced in response to the coronavirus pandemic pushed them to break new ground and work harder than ever. We've seen firms adapt campaigns, create new engaging content, and utilise digital channels in very impressive, innovative ways (and at high volumes!).

That's why Savvy Investor and White Marble Marketing collaborated to create the first award designed specifically to recognise the hard work and campaigns delivered by marketers in response to the pandemic. This dedicated award felt like a great way to recognise and commend the teams and initiatives that have really made an impact, especially when serving clients around the crisis and beyond.



JUDGING THE THE MARKETING RESPONSE TO CORONAVIRUS AWARD

Senior representatives from both Savvy Investor and White Marble Marketing sat on the six-person judging panel for this award, bringing over 50 years of combined experience within marketing across the investment industry.

Our judges were not necessarily looking for innovation and ground-breaking campaigns. Instead, they were on the hunt for displays of ingenuity and togetherness – for example, how teams adapted existing campaigns and calendars, delivered something new to the firm, or creatively used only the tools available while working from home.

The judging panel assessed four core components of each submission:

1 Evidence of change and response to the coronavirus crisis

2 Clear drive to better meet the changing needs of the business and clients

3 Campaign assets including quality of content, substance, aesthetic appeal, and distribution

4 Measurement data to support the impact and results of the campaign

The selection process began by reviewing and scoring all submissions based on the above criteria. We asked all submissions to include the following:

- ✓ **Set the Scene:** Outline your pre-crisis marketing plans
- ✓ **Crisis Marketing Objectives:** How did the crisis change objectives and requirements?
- ✓ **Response and Ideas:** How did the team respond, adapt, and shift to better support the firm and clients?
- ✓ **Activity and Execution:** How was it all pulled together and executed?
- ✓ **Impact:** How did the firm and clients benefit?
- ✓ **Closing Statement:** Summarise achievements and why you deserve to win
- ✓ **Appendix:** Attachments or links to plans, content, websites, data, feedback etc.

The panel then generated a shortlist of 10 entries, each of whom were invited to attend a 30-minute qualitative interview. From this, six were shortlisted before the three finalists were agreed upon.

Undertaking the Savvy Awards process has been a real privilege for Savvy Investor and White Marble Marketing. We'd like to extend huge congratulations to all those who won or received a commendation!

Thank you to those who submitted, and indeed to all content and marketing teams across the industry who support their clients and firms all year round.

View the Winners!



Overall Winner & Best All-Rounder **MFS INVESTMENT MANAGEMENT**

Having taken the temperature of how clients were feeling, the marketing team at MFS Investment Management diverted considerable resource to supporting the efforts of their sales and investment teams. They demonstrated unrivalled responsiveness to delivering content and events based on the needs of their clients. This required them to take new and, in some respects, novel approaches to their marketing – seeing great outcomes. A worthy winner on content, execution, and results.

Highly Commended – Team Commendation **COLUMBIA THREADNEEDLE INVESTMENTS**

The steadfast team spirit was clearly evident in the submission from Columbia Threadneedle Investments, with a marked increase in collaboration across the board. Not only did this stand the team's output in good stead during 2020, but the process, key learnings, and team comms have been fully integrated into standard working practices, helping to remove silos and increase learning opportunities for team members.



Highly Commended – Client Commendation **JANUS HENDERSON INVESTORS**

Janus Henderson Investors was one of the first firms to respond to the pandemic, launching a coronavirus landing page in late February. They utilised their collective investment knowledge and industry network to deliver client-focused content, prioritising substance over style. Recognising the importance to investors of understanding the science behind COVID-19, they hosted a 'Science and Investment Implications' video series, showing a more personal approach to their client activities.

Meet the Judges



Sonia Irvine

Brand Director & Senior Marketing Consultant, White Marble Marketing

Sonia joined the White Marble Marketing team in June 2019, bringing a deep understanding of the full marketing mix garnered from over 18 years of marketing for fund management groups across EMEA and North American markets. Prior to joining White Marble, Sonia was Head of Brand & Comms, Europe for J.P. Morgan Asset Management and spent many years prior to this working for the likes of Aberdeen Asset Management and Invesco in senior marketing roles. Sonia completed an Executive MBA in 2015, having previously studied to MSc level in 1999.

Andrew Perrins

Chief Executive Officer, Savvy Investor

Andrew is CEO and co-founder of Savvy Investor. After qualifying as an actuary, Andrew worked as a Quant Analyst before becoming a Fund Manager and then Director of Asset Allocation at Abbey Life. After 17 years at Abbey, he left to join Chase Manhattan Bank as their Head of Global Asset Allocation in 1998. Since leaving the City, Andrew has worked in the investment media industry, running a successful conference company for several years before launching Savvy Investor in 2015.



Tazeen Jobbar

Marketing Consultant, White Marble Marketing

Tazeen has over 20 years of experience in financial services marketing, ranging from asset management, mortgages, and short-term finance. In her previous in-house roles, she has planned and executed large scale UK and Pan European print and digital advertising campaigns, working alongside key stakeholders and external creative and media agencies.



Ximene Weaver
Head of Content & Marketing, Savvy Investor

Ximene Weaver started her career as a content writer at M&G Investments before becoming Senior Content Manager at Russell Investments, and afterwards Content Lead at NatWest Markets. Ximene therefore has deep insight into the writing, promotion, marketing, and consumption of investment content. She specialises in editing and content strategy development, while writing novels in her own time.

Lisa Mattes
Marketing Executive, White Marble Marketing

Lisa joined the White Marble Marketing team in July 2020 and brings a diverse perspective from her extensive experience in the events industry. She has covered global campaigns across the full marketing mix, website deliveries, and helps to enhance White Marble's internal marketing efforts.



Alex Nicholls
Head of Operations, Savvy Investor

Alex Nicholls works closely with Savvy Investor's partners, which include many of the world's top asset managers, index providers, and other institutional service providers. His role is focused on customer success. Alex has a strong understanding of the challenges faced by investment marketers in order to generate return on investment from their activities.

The Judges on why they won... MFS Investment Management

MFS Investment Management are the overall winners of the Savvy Investor Marketing Response to Coronavirus Award 2020.

The sheer focus on making sure that the team delivered timely, relevant, and useful content to their clients was crystal clear in MFS' award submission. This coupled with the fact that they had never developed global communications prior to the pandemic is testament to their new processes and fast turnaround times, enabling content to be distributed to clients at warp speed and in a multitude of different ways. The business areas were clearly able to come together effectively and work as one team, from top to bottom: a well-deserved overall winner.

The team's deep understanding of client needs came through with the decision to pause email marketing blasts. This level of thoughtfulness really impressed the panel of judges as did the way that the team actively sought out client opinion to inform their changing plans.

The team thought outside of the box when it came to events and insight, even

“The MFS team responded incredibly quickly to the crisis, pivoting to ensure their efforts were aligned to the needs of their clients, sales team, and firm. With quicker compliance processes, innovative lifestyle content, and a palpable, dynamic energy that drove the team, the MFS submission stood out as a clear all-round winner.”

Ximene Weaver, Award Judge





OVERALL WINNER

delivering a lifestyle series. The judges felt that this content was an impressive addition to their campaign, bringing variety, and demonstrating a unique level of understanding to what makes a rounded service offering.

Looking ahead, the team also demonstrated an ability to reflect well on both the positive and more challenging aspects of their response to the virus. As the market now looks forward to a prolonged period of digital-only events, the need to introspect to inform future plans is really important. MFS' awareness of this, alongside their recognition of the seismic shift that took place over 2020, shone throughout the various stages of the judging process. A great submission and a fantastic team!

Congratulations to the MFS team!

“MFS demonstrated and executed on their mission to reassure clients that they were around for them. The crisis pivoted the global teams to pull together and leverage experience and skill from across the company for the benefit of the client. A worthy winner on content, execution, and results.”

Tazeen Jobbar, Award Judge

Company Showcase

with MFS Investment
Management

In 1924, MFS launched the first US open-end mutual fund, opening the door to the markets for millions of everyday investors. Today, as a full-service global investment manager serving financial advisers, intermediaries and institutional clients, MFS still serves a single purpose: to create long-term value for clients by allocating capital responsibly. That takes their powerful investment approach combining collective expertise, thoughtful risk management and long-term discipline. Supported by MFS' culture of shared values and collaboration, their teams of diverse thinkers actively debate ideas and assess material risks to uncover what they believe are the best investment opportunities in the market.



“OUR MARKETING PLANS AND ACTIVITY IN RESPONSE TO THE CORONAVIRUS CRISIS QUICKLY PIVOTED FROM WHAT WE HAD ORIGINALLY SET OUT TO DO IN 2020, TO WHAT WE NEEDED TO DO.”

Lucy Davidson
Marketing Director - EMEA

Marketing Response to Coronavirus Highlights:

1 Directly asked clients what they needed and adapted 2020 plans accordingly

2 Expediated compliance processes to improve the rate of speed to market

3 Rated first by clients for overall service received during the pandemic versus peers

“WE KNEW THAT THIS WAS NOT A TIME FOR ‘SELLING’; THIS WAS A MOMENT FOR SHOWING THE TRUE VALUE OF A RESPONSIBLE, LONG-TERM INVESTMENT MANAGER.”

A note from Lucy, Marketing Director – EMEA at MFS, about winning the award:

When we heard about this award we knew immediately that we wanted to apply. 2020 was one of the toughest years I can remember for a marketing team but, when we look back at what we achieved, it was also one of the most productive years. What the global team were able to achieve in the work-from-home environment was truly quite amazing. We drove cross-channel client initiatives and delivered valuable support to our clients through an extremely challenging period.

Our ultimate aim was to ensure MFS clients had the support they needed and the global marketing team stepped up alongside the entire firm to ensure that every client felt supported.

We knew that this was not a time for ‘selling’; this was a moment for showing the true value of a responsible, long-term investment manager. The marketing initiatives through 2020 were the strongest I’ve seen from a marketing team, working tirelessly to launch new digital experiences, rapidly increasing video production, building new virtual seminars, and delivering value add for our clients to help with the challenges we all faced such as home schooling.

The global marketing team threw all they had at the challenges facing our clients and it’s really rewarding to see this recognised — every single person across the department contributed towards this award, so it’s a big thank you to them for making it happen.

A little bit about the marketing team at MFS Investment Management...

The MFS marketing team is based in London, Boston, Toronto, Singapore, and Sydney. Marketing managers are dedicated to a specific channel but have been working with a cross-channel mindset over the past 12 months.

MFS has a full suite of in-house capabilities which covers digital, video, editorial, social, RFP, creative services, corporate comms, and event management.

These resources are shared across all channels and have been instrumental to the efficient development and distribution of marketing assets and campaigns globally.

The marketing team’s structure and coverage allowed it to remain flexible during the disruption and market volatility brought on by COVID-19.

“CRISES CAN BRING OUT THE BEST OR WORST IN PEOPLE AND ORGANISATIONS. WE BELIEVE THE COVID-19 CRISIS BROUGHT OUT THE BEST IN MFS.”

Q&A

with Award Winner: MFS Investment Management

Digging a little deeper into MFS' marketing response to coronavirus, our panel of judges chatted to Lucy Davidson, Marketing Director – EMEA.

So, why did you apply for this award?

I've honestly never seen so much output come from our marketing team as has done this year, particularly around client-focused activity. Coronavirus has clearly created a lot of upheaval extremely quickly. This award stood out in capturing and recognising the effort of marketing teams to adapt, so it was a natural decision to enter.

Please highlight the three best elements of your submission.

Our marketing plans and activity in response to the coronavirus crisis quickly pivoted from what we had originally set out to do in 2020, to what we needed to do. The three main things that we looked at: clients, contact, and 'value-add'. The very first thing we did was ask our clients what they needed. They asked for more portfolio updates, strategy updates,

“THE VERY FIRST THING WE DID WAS ASK OUR CLIENTS WHAT THEY NEEDED.”

and information on MFS' response to the pandemic from both a business continuity perspective and an investment perspective. The second thing centred around our email marketing campaigns. With our clients moving to remote working situations, we were careful not to bombard them with emails. So we simply decided to stop sending as many of them. Even though we had plenty going on – webinars, executive commentaries, videos, etc – we did not regularly blast them out via email. Instead, our sales team

“WE REALISED THAT WE COULD PROVIDE A HELPING HAND TO OUR CLIENTS AND PROVIDE RESOURCES TO HELP THEM NAVIGATE THESE CHALLENGE TIMES.”

made sure to personalise the contact they had directly with clients, especially through those first few months. The third focus area was to bring ideas together from across the sales and marketing teams. One of the outcomes of this was to expand our 'value-add' programme from the US retail channel to all channels globally. We realised that we could provide a helping hand to our clients and provide resources to help them navigate these challenging times. Client feedback was extremely positive, especially during those very early months when there was very real uncertainty.

From a budget perspective, how did you allocate funds across the campaign?

During those first three months, our priority was simply to respond to client needs. We didn't spend much because a lot of the activity utilised our own channels, resources and in-house teams rather than agencies. I'd say that, overall, the highest spend probably went towards our paid media activity, paid content and some event sponsorship (although that came much later).

What made you stick to your in-house teams instead of using outside agencies?

It came down to speed and comfort level, especially for those recording the executive webcasts and videos. We could've gone down the agency route, but our in-house video team has strong relationships already in place and could work around the clock to get people up and running. This meant we were able to record at home and get it through the system efficiently. It was really important for us to get content out in a timely but still professional

and informative manner. In fact, we even developed new processes with compliance which enabled us to do that more effectively.

Which initiative had the biggest return on investment for MFS?

I think it has to be our 'Market Uncertainty Response Centre' in which we basically launched as a whole new section in our website. Normally if we planned a new web experience the digital team would ask for a few months to plan. But the team got this new section up and running within just two weeks – which was fantastic. It was amazing to have it as a resource that our clients could dip into without us having to bombard them with emails. I think that was the biggest, most valuable thing.

As you look back, what are some of key learnings from the experience and what would you do differently if you could?

That's a really good question! I think we ran too many live calls and webinars. As I look back now, everything was available on-demand or recorded anyway, and people are much more comfortable with listening in their own time. In the beginning, we didn't appreciate this fact but that's how we aim to do things now. I'd also reduce the amount of market commentaries. Although there was a lot to comment on in March and April, it took quite a lot of resource from the team.

What are some of your plans for the year ahead?

From a marketing perspective, this year is about getting back into more of a business-as-usual flow. Crucially, what constitutes business-as-usual has shifted so we're having

“WHAT CONSTITUTES BUSINESS-AS-USUAL HAS SHIFTED SO WE'RE HAVING TO EXPLORE NEW IDEAS.”

to explore new ideas. In-person events are still not on, instead, we're looking at on-demand content and thinking about our digital touchpoints. One of the things we

did at the start of 2020 and will definitely continue in 2021 is supporting our sales team with prospecting in the digital environment. One example is using content as a form of lead generation and using platforms such as Savvy Investor. For me, that's a real area of opportunity now. Our sales team can reach out to people they know but it's very difficult to find those people that they don't know. It will be challenging but I don't think it will be impossible.

Congratulations to Lucy and the MFS team!



Lucy Davidson
Marketing Director – EMEA

“In 2020 the MFS marketing team demonstrated unrivalled responsiveness to deliver content based on the needs of their clients. This required them to take new and, in some respects, novel approaches to the content. They introduced processes to expediate compliance approvals and support their sales teams in a challenging environment. I thoroughly enjoyed Lucy Davidson's passionate and energetic delivery of the MFS submission in our interview.”

Alex Nicholls, Award Judge

Campaign Scrapbook

with MFS Investment Management

Key Performance Stats from MFS' Marketing Response to Coronavirus...

2.4x

more institutional visits in the period March to November 2020 compared to March to November 2019

44%

increase in traffic month-on-month in overall visitation on MFS.com during a peak in March, record attendees compared to 2019

Record #s

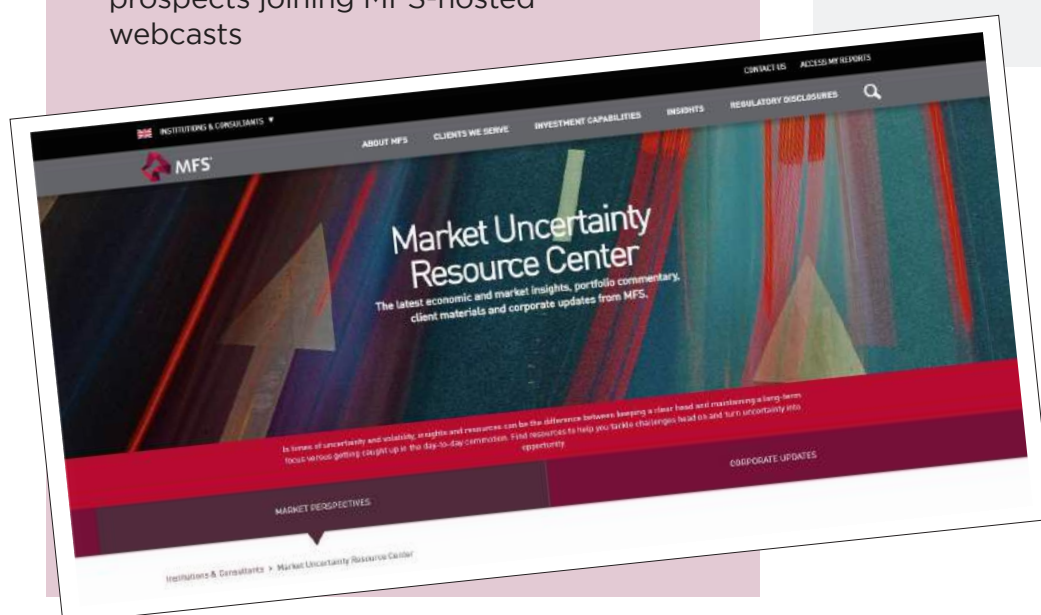
2020 spring saw a record number of clients and prospects joining MFS-hosted webcasts

New sector spotlight video series



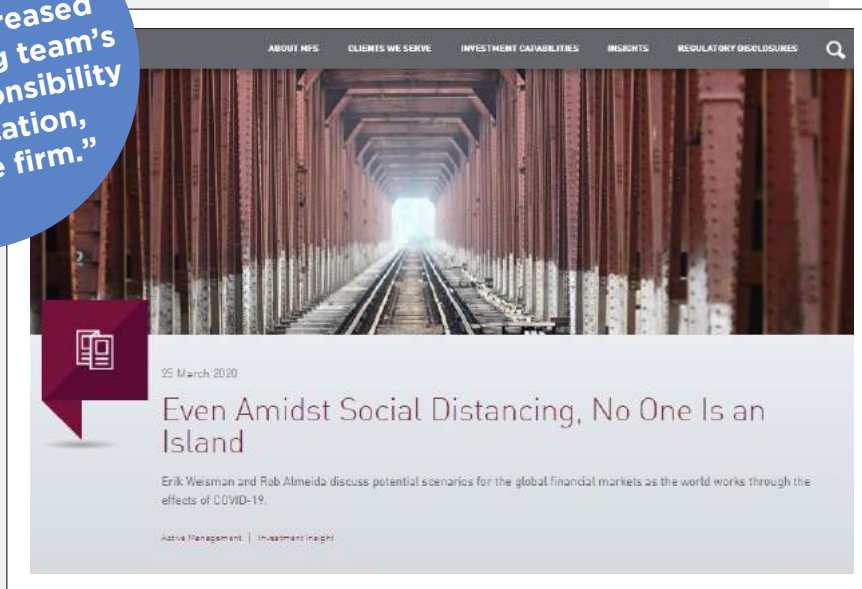
“MFS is a well-deserved winner with a key focus on listening to clients and adapting to their needs without overwhelming them.”

Lisa Mattes, Award Judge



Launched a brand new, dedicated section of their site: the 'Market Uncertainty Resource Center'

“This crisis has certainly increased the marketing team’s profile, responsibility and reputation within the firm.”



Cross-channel value-add events and timely market commentary

“UNDERSTANDING THAT OUR CLIENTS’ PORTFOLIOS WERE LIKELY TO BE IMPACTED, THEIR INBOXES SATURATED AND THEIR DIARIES FULL, MFS’ MARKETING LEADERSHIP AGREED WITH THE GLOBAL DISTRIBUTION TEAM THAT OUR GOAL WAS TO HELP CLIENTS FEEL SECURE DURING UNSETTLING TIMES.”



Executive Webcast Series for clients to hear directly from MFS leadership (CEO, Chairman, CIO, Head of Risk)

“WE ARE PROUD OF HOW THE GLOBAL MARKETING TEAM RALLIED TOGETHER; PIVOTING QUICKLY TO A DIGITAL AND VIRTUAL ENVIRONMENT.”

“As a department, the marketing team has been recognised by our business partners for the role we played this year. Not only in helping achieve record sales numbers, but in keeping clients informed and feeling confident in MFS.”

The Judges on their commendation... Columbia Threadneedle Investments

Columbia Threadneedle are one of two commended entries in the Savvy Investor Marketing Response to Coronavirus Award 2020.

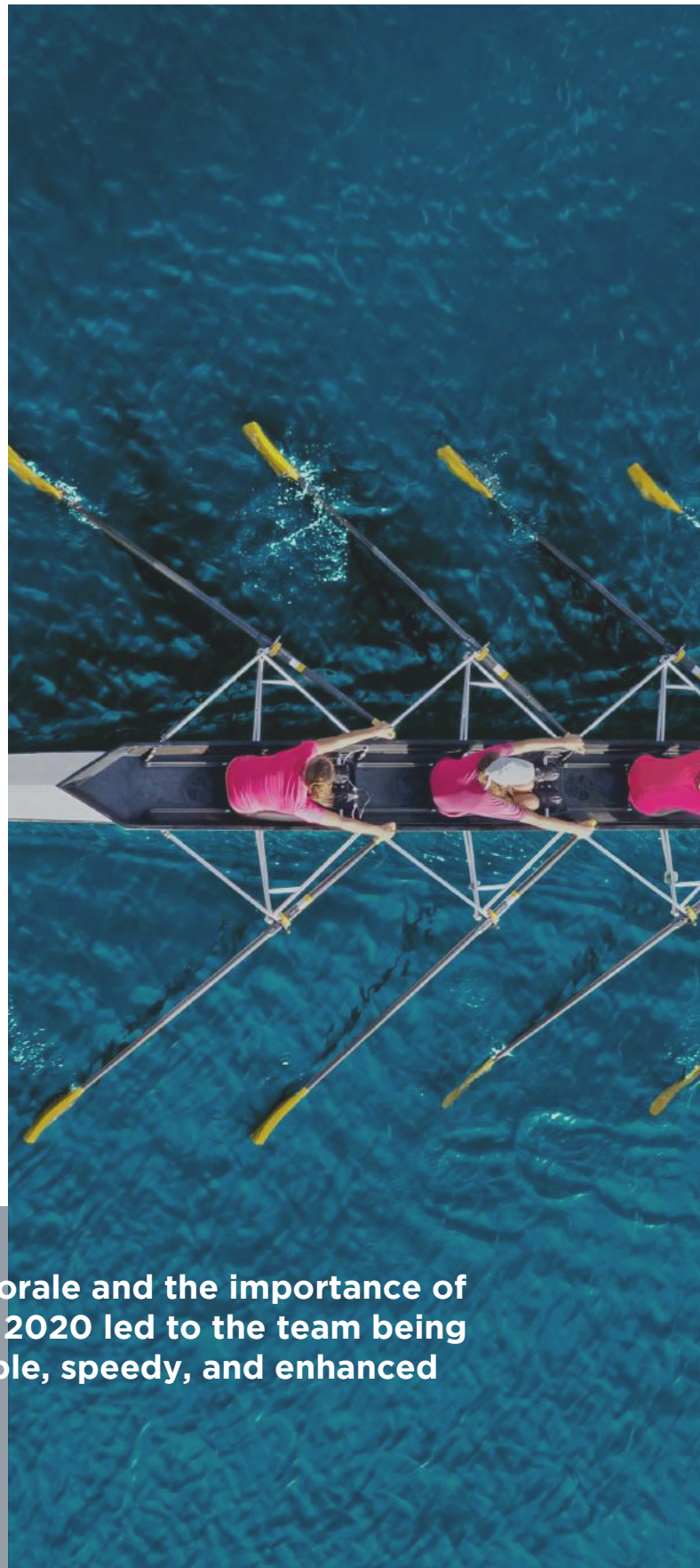
Our judges awarded Columbia Threadneedle the Team Commendation. The firm's investment capabilities draw on a culture of real collaboration, and that ethos was on full display in their submission.

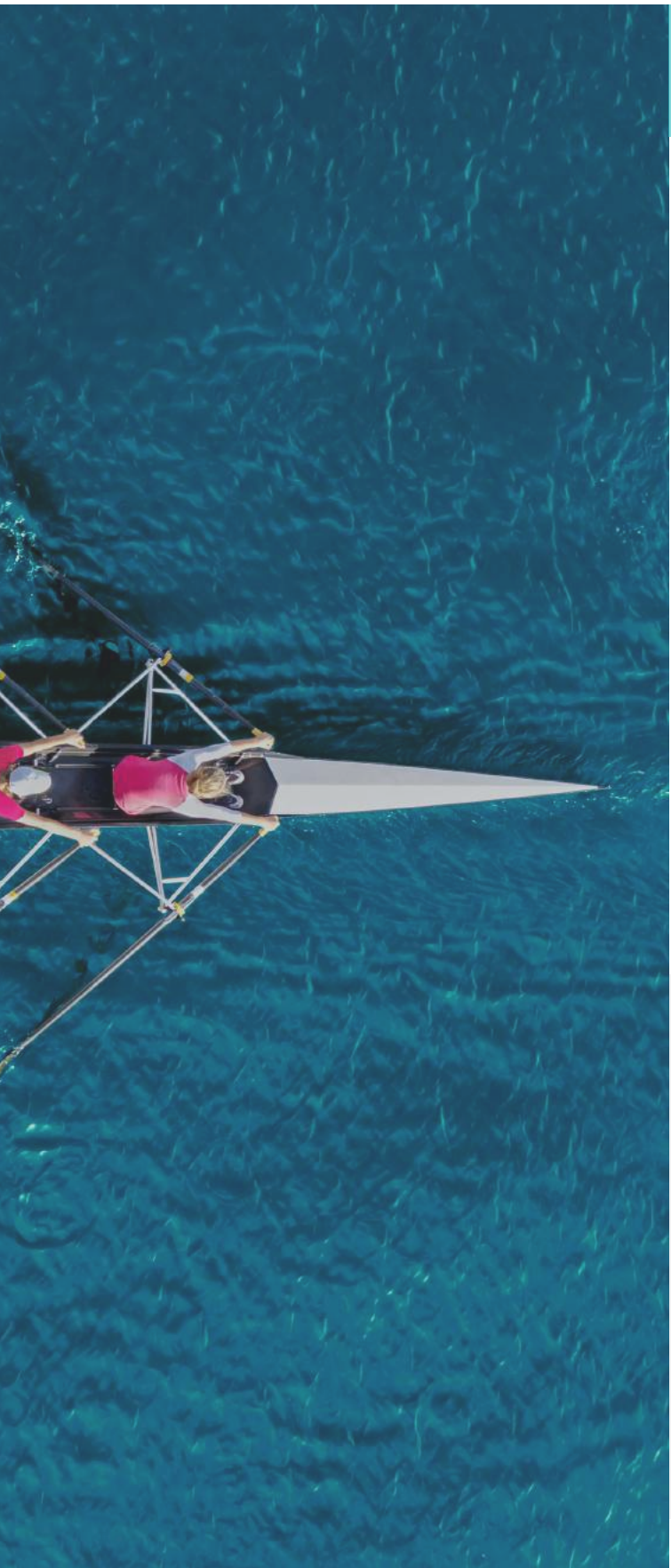
2020 was one of the most stressful years of the team's lives – both personally and professionally – and the panel of judges agreed that the way the team rallied around each other with genuine concern was truly admirable.

With 42 staff across Europe, it was important to enhance communication especially during the the first few months when there was so much uncertainty. Regular meetings were set up for the purpose of checking in with each other, as well as for generating ideas on how best to continue serving clients. There was a strong emphasis on transparency and honesty – a team trait admired by our judges.

“The clear focus on team morale and the importance of communicating throughout 2020 led to the team being able to deliver strong, flexible, speedy, and enhanced activities.”

Sonia Irvine, Award Judge





TEAM COMMENDATION

Breaking down silos between cross-functional teams and enhancing collaboration became a feature of their new normal. Also, there was a strong emphasis on leveraging content and making it work hard for them, re-adapting it for different platforms and purposes... the so-called 'content turkey' (a phrase that our judges repeated endlessly throughout the judging process!).

Many members of the team were trying new tech for the first time, putting themselves out there. The judges especially liked the team's key mantra: "Don't let perfect get in the way of great". Throughout the process, one of the team leaders' guiding principles was to ensure the team's welfare and wellbeing came first because that was crucial to them serving their clients well – an element of the submission that our judges loved to see.

Congratulations to the Columbia Threadneedle team!

“Columbia Threadneedle were able to strike a balance by making the most of every piece of content. It was also clear that at the forefront of their campaigns were their clients.”

Alex Nicholls, Award Judge

Company Showcase

with Columbia Threadneedle Investments

Millions of people around the world rely on Columbia Threadneedle Investments* to manage their money, including individual investors, financial advisers, and institutions. To all clients, Columbia Threadneedle has one message: your success is our priority.

Global Reach: Columbia Threadneedle have built a global team of 2,000 people working together, including more than 450 investment professionals sharing global perspectives across all major asset classes and markets.

Research Intensity: 180 analysts are dedicated to finding original, actionable insights that are shared and debated with portfolio managers. Responsible Investment (RI) principles are important and proprietary tools are applied to provide a robust RI framework.

Forward-looking: The Independent Investment Consultancy & Oversight team ensures the integrity of an investment strategy, working with portfolio managers to foster continuous improvement.



A little bit about the marketing team at Columbia Threadneedle...

The Columbia Threadneedle Investments EMEA marketing team, comprising 42 people across five European offices, is structured to support clients across direct, wholesale, and institutional channels. The team has the people and processes in place to ensure that clients get the information they want, the way they want it. Combining fund management expertise with marketing skills, they create content ranging from product brochures, market commentary and strategic outlooks, to investment themes videos, training seminars, and workshops. They deliver timely insights to clients, covering the most topical investment, macroeconomic, and geopolitical issues, while their investment themes videos generate widespread interest. Finally, the Columbia Threadneedle marketing team have the resources and expertise to invest in brand and advertising. They strive to deliver consistently and effectively on their brand promise to clients – your success, our priority.

*Columbia Threadneedle Investments (Columbia Threadneedle) is the global brand name of the Columbia and Threadneedle group of companies.



A note from Sarah and Diana, Co-Heads of EMEA Marketing at Columbia Threadneedle, about being commended:

We are delighted to be commended in the Marketing Response to Coronavirus Award category, as it reflects well on the hard work put in by our entire team, from channel marketing, digital and the design studio, to product marketing, content, and presentations. This award is also recognition that the more collaborative way in which we worked throughout 2020 was successful.

This is why we wanted to apply for the award: because the coronavirus crisis drastically altered our marketing plans and meant that we all had to work more as a team than ever before, both within the marketing team and with other departments at Columbia Threadneedle such as sales, operations, and investments. We felt that the award would be extremely timely for our EMEA marketing team as it would send a message that their effort was not only hugely appreciated internally, but was also worthy of external validation and we could go toe-to-toe with our peers, many of whom have larger teams.

Our pre-crisis EMEA marketing strategy had clear objectives and focus funds/themes for each channel and region, with KPIs and budget aligned to the sales strategy and targets. COVID-19 meant we had to rework all our plans and think of new ways to communicate as we entered uncharted

“THE CORONAVIRUS CRISIS DRASTICALLY ALTERED OUR MARKETING PLANS AND MEANT THAT WE ALL HAD TO WORK MORE AS A TEAM THAN EVER BEFORE”

territory. To not only cope with all of the issues raised by the pandemic (home working, technology, cancellation of events, home schooling for many etc.) but to thrive and prosper as a team, is hugely gratifying. We couldn't be prouder of each and every member of our team.

But the coronavirus was also a chance for us to pivot quickly and demonstrate our adaptability, innovation, knowledge, and expertise. We quickly turned face-to-face client events into web conferences, we switched from professionally recorded videos to remote video recording, we trialled live translators for some web events, we switched to more regular, snappy pieces of content to satisfy the change in client demand.

In order to be fluid and highly responsive throughout the year, we never let perfect get in the way of great. This meant that we all went on the journey together. And we have emerged stronger as a result.

Sarah Shove and Diana Portman
Co-Heads of EMEA Marketing at
Columbia Threadneedle

“THIS AWARD IS ALSO RECOGNITION THAT THE MORE COLLABORATIVE WAY IN WHICH WE WORKED THROUGHOUT 2020 WAS SUCCESSFUL.”

Campaign Scrapbook

with Columbia Threadneedle Investments

Key Performance Stats from Columbia Threadneedle's Marketing Response to Coronavirus...

53.3%

increase in web visits year-on-year as well as page views up 33% showing a strong rise in digital engagement

3,000

clients attended WebEx conferences between 3 April and 1 August 2020, with over 5,600 total views across 41 events

192%

higher audience views than usual video view rate, attracted by our fund-manager-from-home videos

New brand adverts were created in response to COVID-19 to promote their brand promise and to show adaptability and strength



The World in Motion blog lifts the lid on what Columbia Threadneedle Investments do and shows how the investment engine works



Fund-manager-from-home videos

“Test and learn – and don’t be afraid to fail fast!”

Social Fund highlights

€176.5m
Invested, out of €185M
under management

3
Licences
& Awards

272
Bonds from
162 issuers

Social Targets & Profile

Social Target	Achievement 2019-2020	Achievement 2018-2019
Over 20% of the fund invested in Social Impact Investments (listed A)	24.2%	24.8%
Under 20% of the fund invested in Lower Social Outcomes (listed C3 or C4)	23.5%	21%
Raising the Average Social Intensity Score year on year	18.2	18.1

Diversified portfolio targeting seven outcome areas aligned to the UN Sustainable Development Goals:

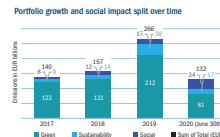
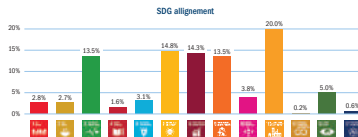


- Access to Services
- Affordable Housing
- Community
- Economic Regeneration & Development
- Education & Training
- Employment
- Health & Wellbeing



- The Fund celebrates its 3 year anniversary
- The Fund passed it's €100m AuM milestone
- The Fund has benefitted from a general shift from Environmental to Social themes

All our investments are mapped to the UN Sustainable Development Goals (SDGs), demonstrating the Fund's alignment with global social and environmental imperatives.



Infographics were a great medium used to engage clients

“IT HAS BEEN THE TIMELINESS AND RELEVANCE OF OUR MARKETING CONTENT IN GENERAL THAT REALLY HELPED DISTINGUISH US FROM OUR PEERS HERE IN GERMANY.”

Florian Uleer, Head of Germany



“As soon as the pandemic hit and market volatility increased, we experienced an immediate increase in demand for information from our clients. They wanted to know how their investments were faring, what our investors were doing, and what we thought might happen next in both markets and economies – all critical data impacting our investment strategies. The marketing team swung into action extremely promptly, delivering marketing collateral to both inform and reassure clients. Crucially, they very quickly launched web conferencing, meaning our fund managers were able to present directly to our clients and keep them up to speed on appropriate events impacting our strategies and ultimately their own clients’ actual holdings. It was a fast-moving and rapidly changing environment, but the communication feedback loop we already had in existence with marketing meant that, not only were we able to get our message out to clients, we were able to adapt and change that message according to what our clients wanted.”

Alastair Caw, Head of UK Wholesale

The Judges on their commendation... Janus Henderson

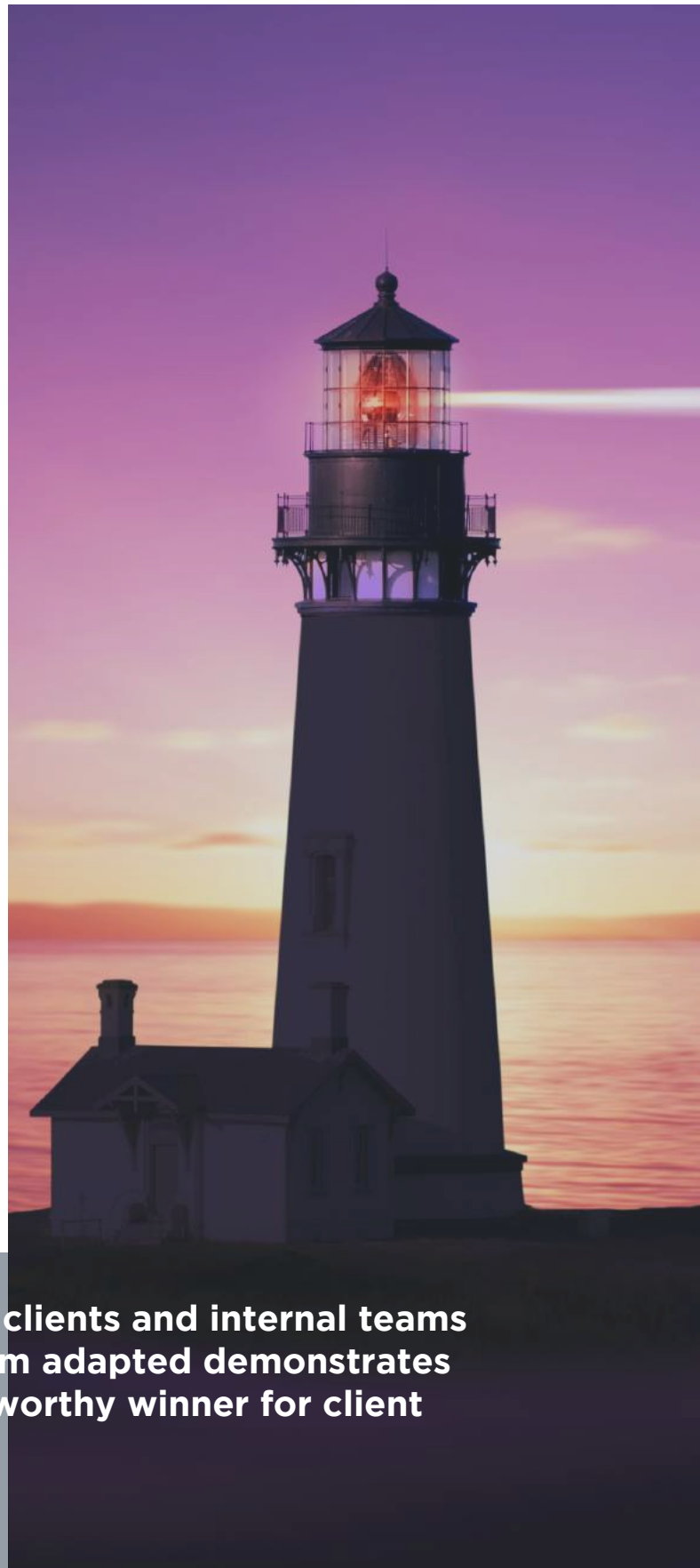
Janus Henderson Investors are one of two commended entries in the Savvy Investor Marketing Response to Coronavirus Award 2020.

One of Janus Henderson Investors' top priorities is to ensure that "clients are on the right side of change". The panel of judges agreed that this ethos shone through in their submission which demonstrated how the different teams worked together to this end. As such, we awarded Janus Henderson the Client Commendation.

The new daily meeting between the content marketing and compliance teams helped speed up the process for getting content approved, especially the new forms of content being produced such as client updates and videos from home. The team also made the content shorter and more easily digestible based on client requests for quick and frequent updates. As governments and central bank responses led markets to recover, longer-form content was produced on the longer-term investment themes. For our judges, this deep understanding of how to engage clients really stood out and impressed.

"Fantastic feedback from clients and internal teams on how the marketing team adapted demonstrates Janus Henderson to be a worthy winner for client focus."

Lisa Mattes, Award Judge



CLIENT COMMENDATION

Collaboration between Janus Henderson staff was key. Investment managers were supported in recording videos from home to allow for timely updates. The marketing and digital teams helped them get comfortable with the technological equipment. Amidst all of this, and with unprecedentedly high levels of commentary from across the asset management community, standing out from the crowd was a key priority for Janus Henderson. So, in response they brought the firm's Life Sciences Equities team to the foreground as a way of differentiating the business, but also as a way of delivering truly useful information about the virus, its likely trajectory, and the potential outcomes for markets – a standout feature for our judges.

All these activities enhanced the firm's client relationships, and this was reflected in the feedback that clients gave.

Congratulations to the team at Janus Henderson!

“Janus Henderson was one of the first firms to respond to the pandemic, launching a coronavirus landing page in late February, prioritising substance over style and quickly shipping branded backdrops for fund manager video calls from home.”

Andrew Perrins, Award Judge

Company Showcase

with Janus Henderson

The notion of ‘connecting’ is powerful – it has shaped our evolution and our world today. Janus Henderson seeks to benefit clients through connections. Connections enable strong relationships based on trust and insight as well as the flow of ideas among investment teams and engagement with companies.

These connections are central to Janus Henderson’s values, to what active management stands for, and to the long-term outperformance they seek to deliver. Janus Henderson has more than 345 investment professionals, expertise across all major asset classes, and clients spanning the globe.

The logo for Janus Henderson Investors, featuring the company name in a serif font with a horizontal line and the word 'INVESTORS' in a smaller, sans-serif font below it.

“THE CONTENT TEAM’S NEWSROOM APPROACH MEANT WE WERE WELL-PLACED TO RESPOND AS THE CRISIS UNFOLDED.”

A little bit about the content team at Janus Henderson Investors...

The Janus Henderson global content team, including 12 senior investment writers/content specialists, is split between the UK and North America. Working closely with investment and distribution colleagues, the team is key to Janus Henderson’s ‘Knowledge Shared’ ethos. This facilitates the sharing of investment team thinking in an open and timely manner for the benefit of clients.

With a mixture of writing backgrounds and specialisms, the content team delivers thought leadership and product insight ranging from timely blog articles and videos through to in-depth white papers and podcasts exploring asset allocation opportunities. Timeliness is considered critical and newsroom techniques are applied to make content as easy to consume and as engaging as possible. The team supports investment teams and distribution colleagues globally and has a passion for sharing forward-looking views intended to empower clients in their decision-making.

“Janus Henderson recognised early on that they needed to increase the amount of quality content they communicated to their clients. They were quick to market, with a willingness to listen and adapt according to client needs as the pandemic unfolded.”

Tazeen Jobbar, Award Judge

A note from Darrel Billingham, Global Head of Content, about being commended:

2020 was a challenging but exciting time to be providing views and analysis on the fast-changing investment landscape. In times of crisis, we typically see a sharp increase in demand for updates and thinking from our investment teams, and last year proved no exception.

The content team’s newsroom approach meant we were well-placed to respond as the crisis unfolded. The gears, however, went into overdrive as client engagement and questions to our sales teams and managers spiked. Being able to meet these needs, initially with quick-hit, real time, short-form content and

seemed a fitting way to recognise the hours of hard work from the content and marketing teams, which came together globally to allow us to connect with clients. The achievement was all the more notable given the many challenges people were navigating away from work.

We were therefore delighted to be commended for the award, particularly given the high quality of the work we saw from our peers. Content writers and marketers don’t often see their names in lights, so we’re hugely appreciative of Savvy Investor and White Marble Marketing for running this award.

“THE FEEDBACK WE RECEIVED WAS THAT WE WERE AMONG THE BEST IN CLASS IN OUR COVID-19 RESPONSE.”

then transitioning to deeper papers with a longer-time horizon, was hard work but ultimately effective. The strong journalistic skills and investment expertise of the writers came to the fore and targeting our audiences via digital delivery globally was invaluable. The willingness of the investment teams to share their insights was also key to the quality and depth of material we were able to publish.

The feedback we received was that we were among the best in class in our COVID-19 response. This was hugely encouraging and, along with gentle persuasion from our channel marketing colleagues, led to us applying for the Savvy Investor award. It also



Darrel Billingham,
Global Head of Content

Campaign Scrapbook

with Janus Henderson

Key Performance Stats from JHI's Marketing Response to Coronavirus...

150,000+

total web sessions for COVID-19-related articles in 2020, with nearly 42,000 articles read

33%

increase in investment professionals and client meetings, showing that connecting virtually worked; JHI also hosted 76 webcasts and 14 podcasts

>50%

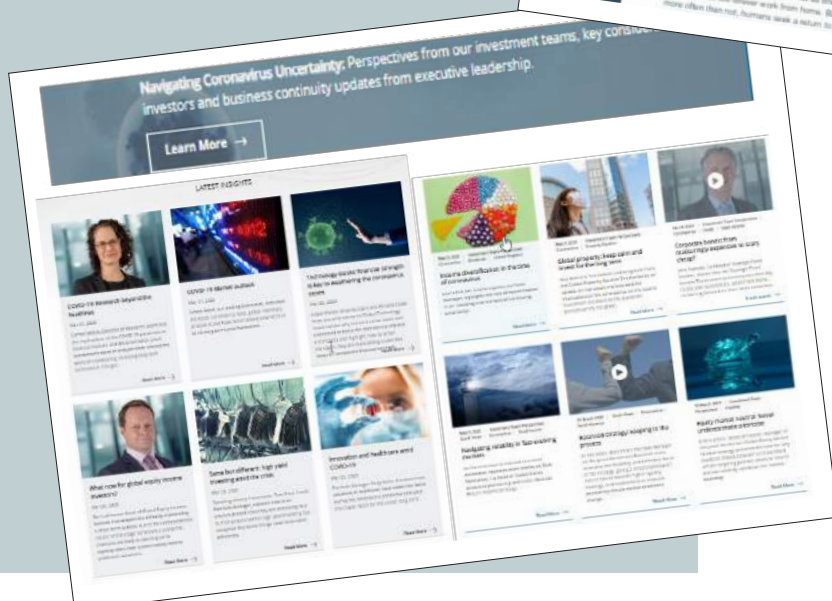
increase in broadcast and print media coverage versus the same period the previous year

"We could not be more thrilled with this recognition, given the extraordinary commitment on the part of our investment professionals, writers and marketing teams over the course of 2020 to help clients understand the relevance of the global pandemic to global markets and critical investing decisions."

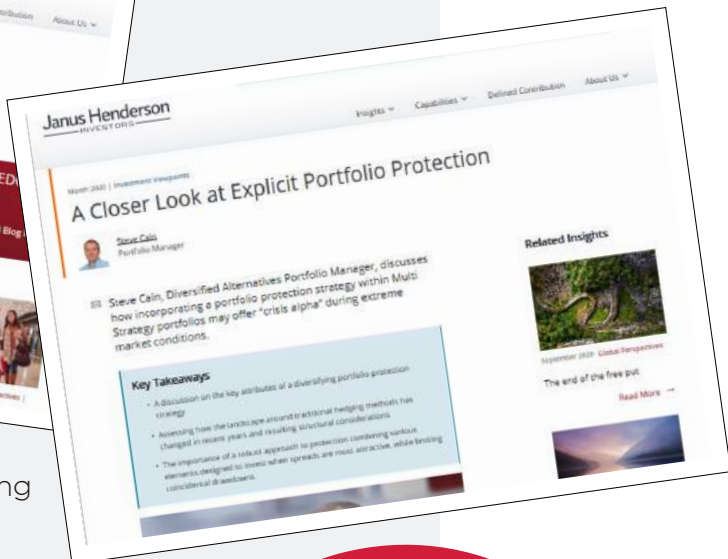
David Master, Chief Marketing Officer

As the dust settled, JHI produced longer-form content on new and developing themes

"Sales staff shared feedback that our insights facilitated quality exchanges with clients and timely responses to inquiries had helped investors to maintain perspective on extreme market volatility. Our credible insights and reliable cadence through the most challenging weeks led to clients seeking more JH insights as volatility moderated."



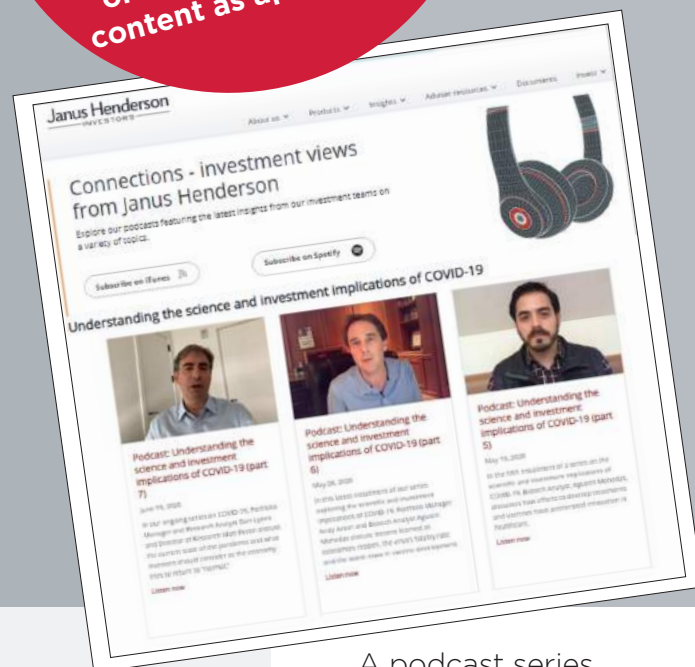
JHI's COVID-19 hub allowed easily accessible content early on and throughout the crisis



Differentiated perspectives from teams covering sustainable investing and alternative strategies

“Our marketing objectives – connecting with clients, sharing knowledge, and building trust – remained intact, but the requirements shifted from a steady cadence to real-time views on what the pandemic and market moves meant for asset classes and strategies.”

“Our response to COVID-19 strengthened our conviction in the need to be able to quickly dial up or down the cadence of communications with clients to suit the situation and target investors with regional, global or asset class specific content as appropriate.”



“Watching the writers and the entire JHI team band together to produce a steady stream of insights for clients was both inspiring and rewarding. The heightened collaboration led to the production of strong thought leadership pieces across multiple publication formats, and robust engagement with clients and prospects.”

Amanda Biscontini, Manager, US Content Team

A podcast series from the Life Sciences team blended science and investment analysis



SAVVY INVESTOR

THE WORLD'S LEADING KNOWLEDGE
NETWORK FOR INSTITUTIONAL INVESTORS

Savvy Investor www.savvyinvestor.net is the world's leading platform for the distribution of white papers to institutional investors. Each month, around 30,000 white papers are downloaded from the site.

The platform is designed to maximise user engagement by displaying high-quality content, tailored to the professional interests of the individual user. During registration, members indicate their interests by selecting from a list of topics. This can be amended at any time, and is used to populate content for the user's home page and e-newsletters.

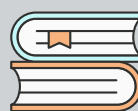
The site navigation is divided into 50 topics, each topic having its own landing page and content listings. In addition, the site has a powerful search functionality, allowing users to quickly find the best content on any given topic.

Members receive a weekly e-newsletter and regular thematic emails, containing content which matches their own unique combination of interests. Engagement remains high because members know that any email we send them will match their areas of interest.

By aggregating content from around the industry in a single location, Savvy Investor enables members to work smarter. Each piece of content is reviewed, rated, and assigned topics and tags. This allows members to cut through the noise and quickly identify relevant content.

www.savvyinvestor.net
business@savvyinvestor.net

THE SAVVY INVESTOR PLATFORM



10,000+ papers and articles



500+ videos, webinars and podcasts

200+ companies listed

50,000+ members

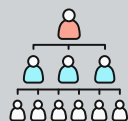
PARTNERSHIPS WITH SAVVY INVESTOR

Savvy Investor works in partnership with asset managers, index providers, and other organisations to promote their marketing content, to affirm their thought-leadership credentials and to generate quality leads.

There are three core components to partnership benefits:



1. Content curation and brand awareness



2. Content promotion and targeted distribution



3. Lead generation and partner success programme

To discuss working with Savvy Investor and promoting your content, please reach out to Stuart Blake, Head of Partnership Sales.

Email: stuart.blake@savvyinvestor.net
Tel: (+44) 203 327 2259

SPECIAL REPORTS

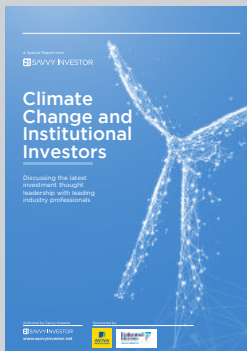
Savvy Investor publishes a regular stream of Special Reports where we showcase some of the latest whitepapers on topical themes.

Each Special Report includes an introduction on the selected topic area, two featured papers, two interviews with a subject matter expert, and a list of the best recent industry papers on that topic.

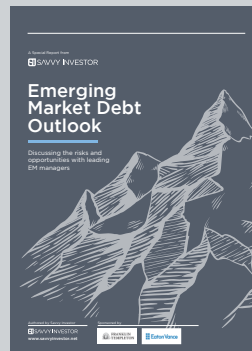
If you are interested in showcasing your next piece of flagship content or a selection of your latest noteworthy papers, sponsoring a Special Report is a great way to actively engage leads and start a conversation on some of the biggest issues and trends relevant to institutional investors.

PUBLISHED SPECIAL REPORTS

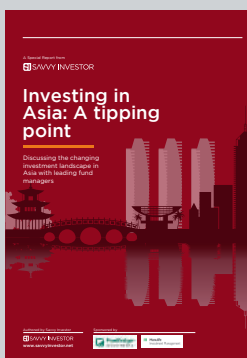
(click to view)



Climate Change and Institutional Investors



Emerging Market Debt Outlook



Investing in Asia



Sustainable Investing

EDITORIAL SCHEDULE

Please see our Editorial Schedule below to see upcoming Special Reports:

February 2021

The ESG Landscape (11 Feb)
Thematic Investing (25 Feb)

March 2021

Investing in Real Assets (11 March)
Factor Investing (25 March)

April 2021

Q2 Investment Outlook (15 April)
Emerging Market Outlook (29 April)

Subject to demand (at any time)

- Alternative Investing
- The Business of Asset Management
- Insurance Asset Management
- Asset Allocation Quarterly
- Fund Management Technology
- Quant Strategies
- Emerging Markets

Other topics upon request...

SPONSOR A SPECIAL REPORT

If you'd like to talk to one of our team about showcasing your content within a Special Report, please reach out to Jonny Walthall, Business Development Manager.

Email: jonny.walthall@savvyinvestor.net
Tel: (+44) 203 097 1728



FOR **EVERY** NEW SAVVY INVESTOR MEMBER **A TREE** **WILL BE** **PLANTED**

In partnership with Eden Reforestation Projects, we have committed to the planting of a tree for every new Savvy Investor member.

Eden Reforestation Projects is a 501c3 non-profit charity whose mission is to provide fair wage employment to impoverished villagers as agents of global forest restoration. Their 'employ to plant methodology' results in a multiplication of positive socio-economic and environment measures.

For more information please [click here](#)



Savvy Investor is a leading knowledge network for institutional investors. Our focus is on enabling pension funds and professional investors to improve their processes and to do their job better.



edenprojects.org
PLANT TREES | SAVE LIVES



Authored by Savvy Investor

 **SAVVY INVESTOR**
www.savvyinvestor.net