

hub.

stepstoinvesting.com

A USER-CENTRIC STRATEGY
FOR SUCCESS FOR

Janus Henderson
INVESTORS



SETTING THE SCENE

Why don't more people invest their money?

It's a simple enough question. And when Hub started researching the savings and investment market, we discovered some of the answers were pretty simple too. Our CEO, David Hunstone attended an event with Simon Longfellow, Global Head of Marketing at Janus Henderson, where one of the speakers said 40% of adults with between £40,000 and £150,000 in savings are put off the idea of investing because they think it's too complicated.

That's a staggering amount of money not being invested, and an awful lot of people missing out, all because of a potential perception problem. Janus Henderson decided to do something about tackling that perceived complexity.

That's how providing alternative sources of reliable – and simple to comprehend – information were to become the central principles of one of our latest campaigns with Janus Henderson Investors.

Formed in 2017 from the merger between Janus Capital Group and Henderson Global Investors, Janus Henderson has a clear commitment to adding value through active management. It has £274.1 billion (US\$370.8 billion) in assets under management, more than 2,000 employees, and offices in 27 cities worldwide. The firm is headquartered in London, and is an independent asset manager, dual-listed on the New York Stock Exchange and the Australian Securities Exchange.

If you wish to view Steps to Investing animation, please [click below to watch](#).



“

40% of adults with between £40,000 and £150,000 in savings are put off the idea of investing because they think it's too complicated.

Jo Philips, Head of Digital Strategy, Blackrock

INSIGHT-DRIVEN APPROACH

Our aim was to provide Janus Henderson with the right strategy, messages, and content to connect with a whole new target market – individuals who had sufficient wealth to invest, but who lacked the confidence and information to get started. One of the first things we did was conduct primary research: interviews with individuals and focus groups, to get a deeper understanding of the personal finance landscape and hear first-hand what people's feelings about investments were.

Through secondary research we discovered that, according to the UK's Office for National Statistics (ONS), 53% of the nation's wealth is owned by people aged between 45 and 64. The ONS also found that UK households have a collective wealth in the region of £1.4 trillion, and that just over half of that (£729 billion) is invested in cash-based savings and investment products where they generate

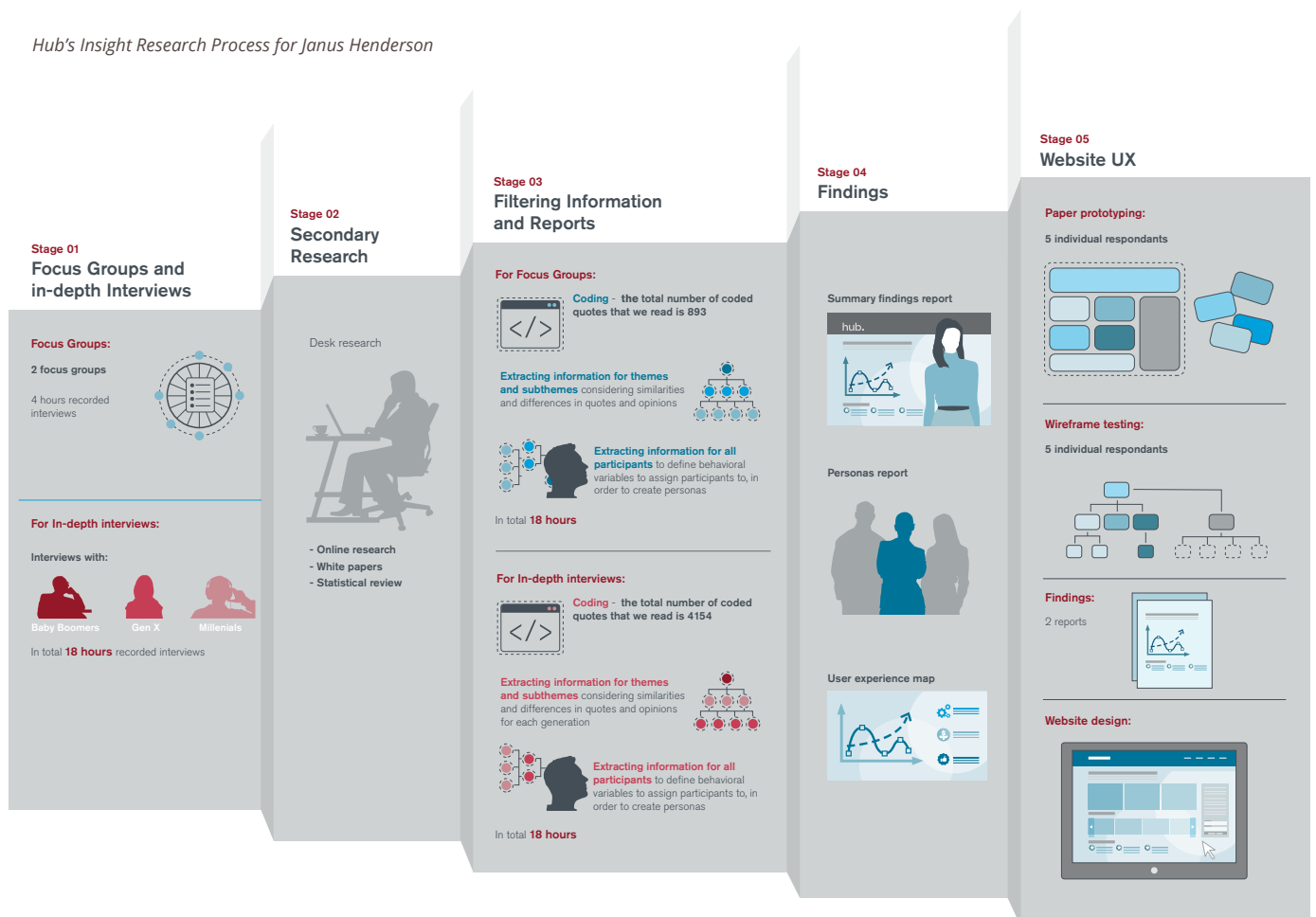
little or no return. In some cases, they were costing more than they were generating.

From both primary and secondary research we were able to code themes and from these themes we produced four persona types. These four persona types informed every decision we made about how best to communicate educational information in an encouraging manner.

We concluded that the three main barriers to people getting actively involved in investing their money were:

- Risk
- Complexity
- Trust

Hub's Insight Research Process for Janus Henderson



It was clear to us that there was a very real opportunity for Janus Henderson to engage with people who would benefit greatly from having a trusted source of investment information they could turn to for easy-to-understand guidance – people with enough wealth to invest but not enough confidence to get started. The key was to develop a series of interesting and informative pieces of content that would lead the target audience on a journey to becoming better informed about investing. It would need to be easy to understand, not patronising, and delivered in a way that took them on that journey in a step-by-step manner.

The campaign was branded stepstoinvesting.com, because it describes perfectly the journey new investors will follow.

A key consideration for stepstoinvesting.com was to tackle the issue of risk. Risk is an integral part of investing, after all. But for the identified personas, coping with the idea of risk can be challenging; assessing levels of risk can therefore seem bewildering. So, rather than attempt to downplay or ignore the presence of risk, we sought to be open and honest about it – we focused on educating our client's new target market. That way, our target audience would start to feel better informed and therefore better able to evaluate risk and make decisions they were comfortable with.



DESIGN STRATEGY

Once the target market was identified, we set out to create a campaign supported by the website that would act as a central content hub, and to position Janus Henderson as a recognised source of information for those wanting to get started in investing. The site's content would therefore need to demystify and decode complex financial and technical jargon, while explaining matters in clear and logical manner.

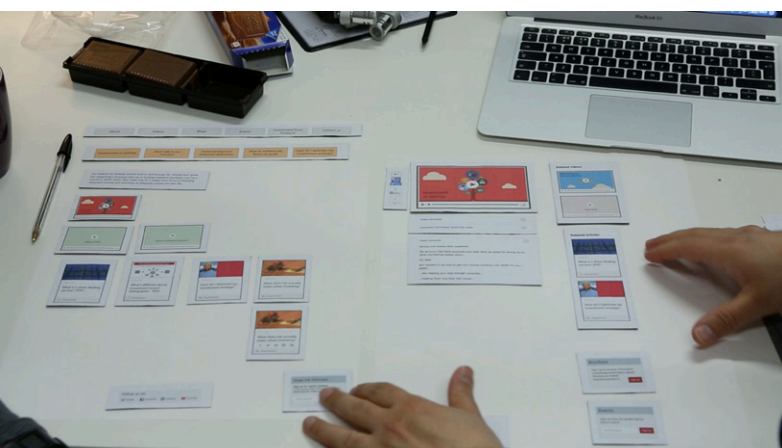
Everything we developed, produced, and built followed a user-centric customer first philosophy to ensure things were visually appealing and easy to use.

To ensure that was the case, we built a series of paper prototypes of the stepstoinvesting.com site, at its various stages of development. Those prototypes were then subjected to rigorous UX testing and were evaluated in full by a team users. We also

constructed interactive wireframes, which were also tested and assessed in the same manner.

User feedback was gathered at each key stage of the project's development and fed into a cycle of iterative improvement that meant not only did the navigation of the site and the content on it work brilliantly and looked great, but we avoided all the obvious clichés and tropes that seem to affect the language used in a lot of financial services sector marketing. The importance of which should not be underestimated; we were developing a campaign for an audience that was not engaging with traditional marketing – finding the right tone of voice was therefore every bit as important as having the right look and feel.

Through a combination of written content, video, and interactive tools, we developed a series of steps to learn about investing.

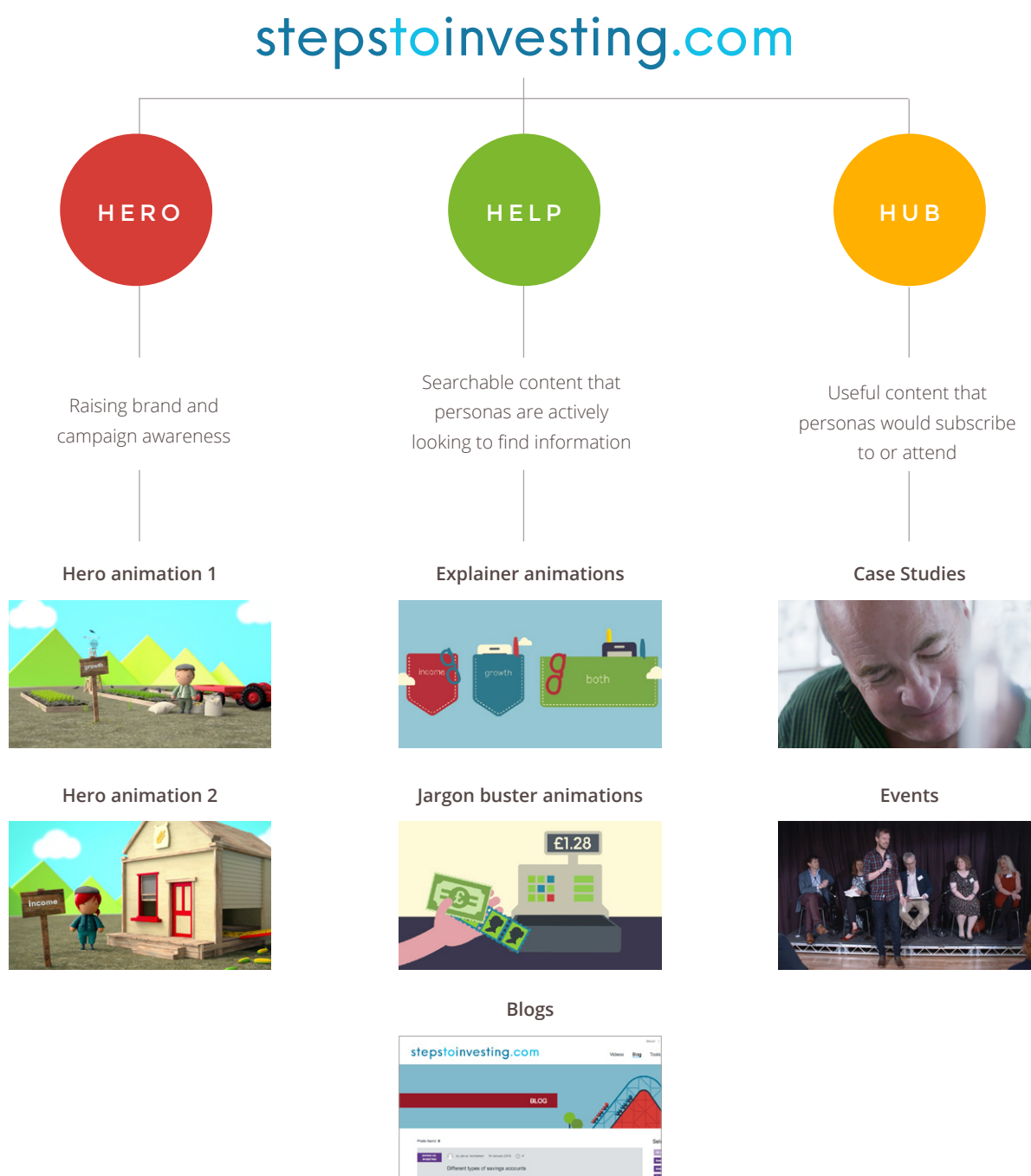


LEARNING TO INVEST IN 5 EASY STEPS



TRIPLE H CONTENT STRATEGY

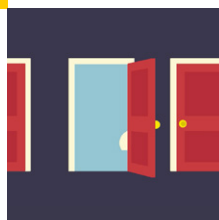
A content strategy was devised to encourage our personas to become familiar with the process of investing. The Triple H framework (Hero, Help, Hub) content strategy was used.



Visitors to the stepstoinvesting.com will find:



15
jargon buster
animations

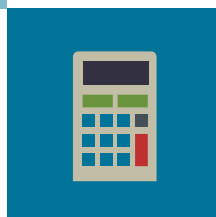
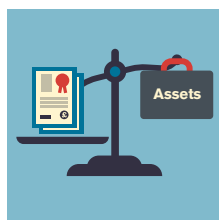


9
explainer
animations



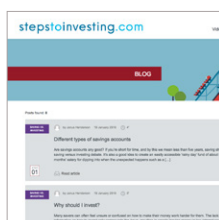
3
case
studies

3
downloadable
infographics



3
interactive tools
(investments, fees
calculator, trust finder)

8
blogs with a
growing series of
posts covering a
range of topics
from different
perspectives.



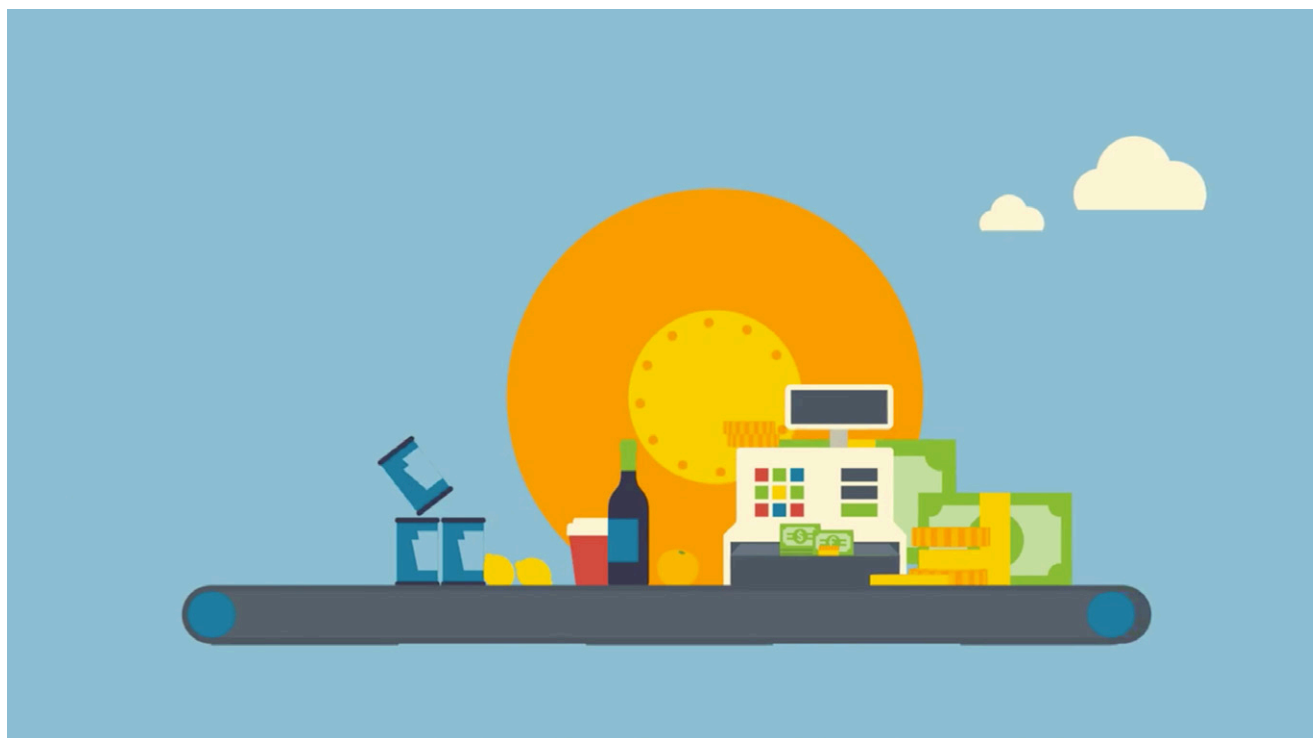
All of which is just the starting point – the groundwork. The site wasn't just built and developed a marketing programme. stepstoinvesting.com has created a central hub for valuable content and insight, aimed at an audience that is keen to acquire knowledge they can benefit from - it will continue to grow as the audience feedback on the information that exists and further information that they require.

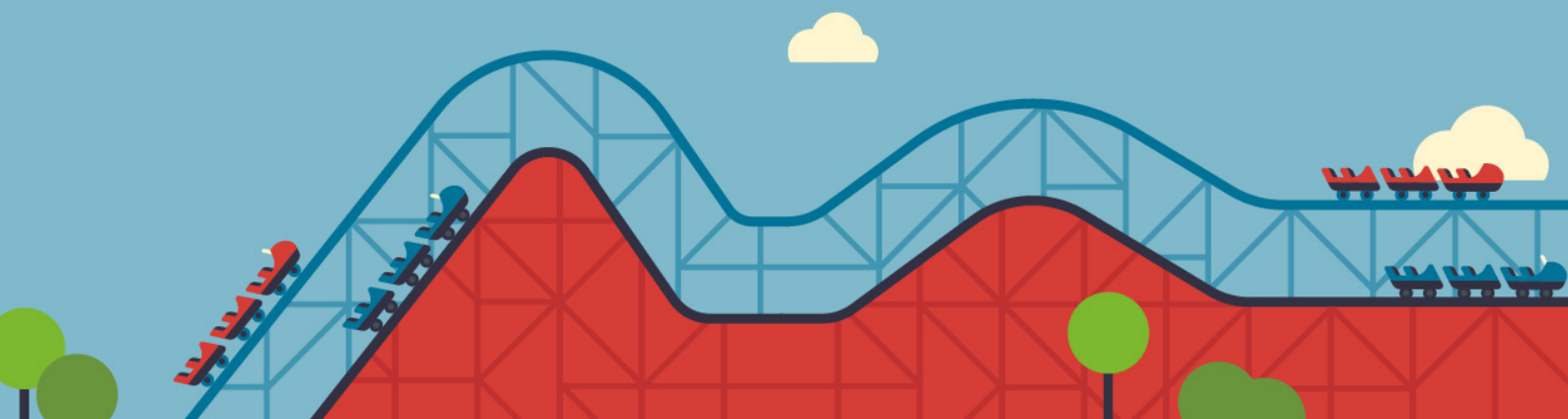
One of the most interesting outcomes of this kind of process is that it often means you end up challenging your own thinking and assumptions, which is never a bad thing. It can mean the project ends up taking unexpected turns, driven by the insight that force you to keep improving on what you do – making evidence-based decisions about the most appropriate course of action to take, then executing with creative excellence.

If you wish to view Steps to Investing explainer animation “Saving vs Investing”, please [click below to watch](#).



If you wish to view Steps to Investing jargon buster animation “Compounding”, please [click below to watch](#).





“

Working from the ground up on a campaign is something we really relish at Hub. It means we have the opportunity to really get under the skin of a client's challenges and construct a strategy that tackles them head-on. That's definitely been the case with Steps to Investing. Our relationship with the team at Janus Henderson stretches back almost five years, and it's been a real delight to help define and execute a campaign that builds on the strength of that relationship and which attracts meaningful new business to our client.

David Hunstone, Cco-Founder and Director of Content at Hub

SUPPORT AND PROMOTION

Once the campaign went live, the hard work of generating traffic, views, clicks, and downloads began in earnest..

Steps to Investing has been supported by a series of activities, including:





A series of *Steps to Investing* events – which follow Janus Henderson's philosophy of knowledge shared – are also part of the supporting activity, extending the reach of the online work into the off-line world. The tone of the events will mirror that of the site; accessible but authoritative, with information provided in short, easily-consumed bursts. The first event took place on 25 April 2018. Feedback was positive and the event confirmed that potential investors valued the opportunity to discuss and question experienced investors.

The campaign, in its infancy, has an exciting future as Janus Henderson have invested in further research and development to ensure it meets the aim of educating people in investing and wealth management.



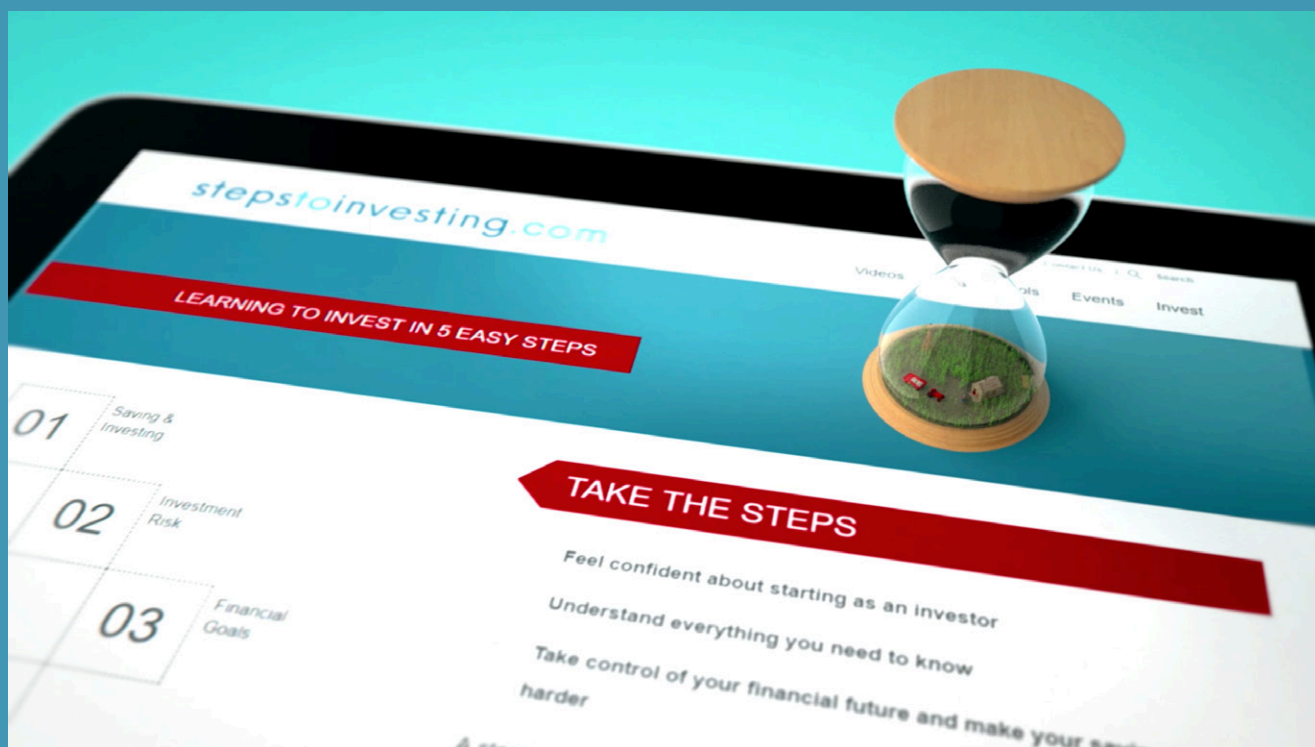
In May 2018 Steps to Investing won an award for Best Marketing campaign. The award panel praised the winner for being bold, well-executed and for doing something different. The site was educational and engaging and the judges felt it was a contemporary approach to marketing.

It has since been shortlisted for the Investment Week Marketing Awards for Proposition Development.

AIC Association of Investment Companies (AIC) Shareholder Communication Awards 2018

Best Marketing Campaign

Winner: Janus Henderson Investors for Stepstoinvesting.com





Savers have been left out in the cold and suffered at the hands of both low interest rates and inflation. But making your first investment is a nerve wracking experience and many people often just give up – the whole industry speaks a language beginners just don't understand and to them the risk of investing can often just seem like a bet on black or red.

Steps to Investing aims to cut through the complexity. We want to give beginners the confidence to dip their toes into the markets so they too can reap the potential benefits of long-term investment.

Simon Longfellow, Global Head of Marketing, Janus Henderson

hub.



FOR FURTHER INFORMATION

CONTACT

David Hunstone

david@hub.tv

Unit 5.11 Clerkenwell Workshop
31 Clerkenwell Close
London EC1R 0AT

www.hub.tv

