FINALIST 2013
B2B AWARDS

HYMANS ROBERTSON
The Spirit of Independence

# B2B Marketing Awards 2013

*Submission for*

## Best integrated or multichannel campaign

## Shaping the market for auto-enrolment



| | |
|---|---|
| **Category number:** | 1 |
| **Category name:** | Best integrated or multichannel campaign |
| **Programme/initiative name:** | Shaping the market for auto-enrolment – a campaign with a human face |
| **Brand or client:** | Hymans Robertson LLP |

# Summary

> We used a highly creative multi-channel marketing campaign to build profile and to capture significant market share right from the start.

The introduction of auto-enrolment is shaking up workplace pensions in a sector that is already experiencing seismic changes.

As a leading pension and benefits consultancy, our aim was to be the first and most prominent player in this brave new world. We used a highly creative multi-channel campaign to build profile and to capture significant market share right from the start.

In-depth research, creative mailings, relentless PR, high-profile events and persuasive telesales all played their part in establishing Hymans Robertson as market leading advisers.

We used  early successes, such as preparing big-name clients for auto-enrolment, to highlight our expertise and provide other firms with a compliance roadmap. Our creative approach focused on taking the stress out of auto-enrolment and it clearly struck a chord with our target audience.

We exceeded our target by a staggering 133%; achieving revenues of £xxxx against an ambitious target of £xxxx. We secured 34 big-name clients.  We also won four prestigious industry awards and our PR share of voice went from 6th to 3rd position during the course of the campaign.

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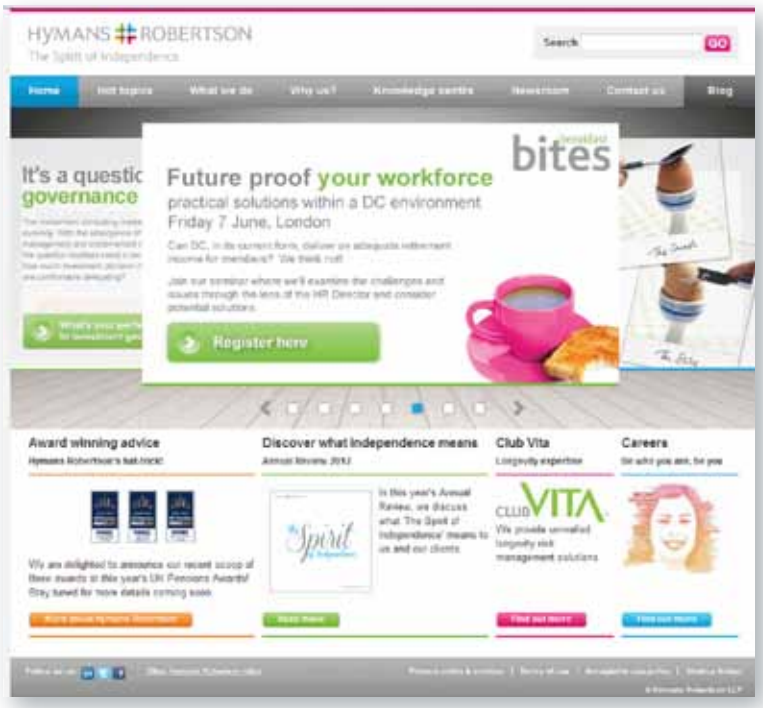
* These details were provided to judges in the original submission but are commercially sensitive and therefore confidential

# About the client company

> We are steadfastly independent.

Hymans Robertson is an independent pensions consultancy advising companies and trustees on pensions, benefits, investments and risk management.

Established in 1921, we help our clients - private sector companies, public sector organisations and financial institutions - deliver their pensions promises. We are steadfastly independent; this spirit of independence gives us the freedom to focus on what is right for our clients – the right advice, set in context.




www.hymans.co.uk

# Strategy

> “Throughout we used an integrated approach to stay in the spotlight and ahead of the competition.”

In early 2011, the Government announced new legislation meaning all employers had to enrol staff in a workplace pension starting in 2012. Our aim was to establish ourselves as market-leaders from the off, guiding clients through the auto-enrolment maze. Our strategy was twofold; build awareness and profile, then directly engage with our target audience to secure market share.

We worked in phases; first using research and PR to get attention and develop industry understanding, then we leveraged real life client case studies from high-profile early adopters, focusing on exploiting our pole position. Throughout we used an integrated approach to stay in the spotlight and ahead of the competition.

Every aspect of the marketing strategy was designed to support the business goal and help the sales effort. Joined-up planning from outset and regular monthly meetings monitored progress and brought the group together, ensuring everyone pulled in the same direction.



# Objectives of the campaign

> We wanted to be the first in the market talking about auto-enrolment and establishing ourselves as trusted market leaders.

We wanted to be the first in the market talking about auto-enrolment and establishing ourselves as trusted market leaders. With that first mover advantage, auto-enrolment would be associated with us and no one else.

Our creative approach was more about helping than selling — but the end goal was to create market share. Our target was to generate revenue of xxxx over two years.

Our long-term business objective is to maintain this pole position and use it as a solid springboard into the Defined Contribution pension market.

# The target audience

The initial target audience was the first raft of companies that would enrol their staff into a workplace pension in October 2012.

Key personnel included: HR directors; finance directors; pensions and benefits managers and directors. They had much in common; all faced a massive workplace pension upheaval, meaning lots to learn but little time, or inclination, to look into it. Many of them didn't know Hymans Robertson yet, so we had to grab their attention.

Research results



# Media, channels or techniques used

> We took a fresh, creative and empathetic approach to auto-enrolment compliance.

A multi-channel marketing strategy built our profile and created engagement with prospects. We took a fresh, creative and empathetic approach to auto-enrolment compliance. This, combined with dedicated follow-up from our business development team, saw us outperform our financial target by 133%.

**Research:** Our survey of finance and HR directors showed that auto-enrolment was barely on their radar. It allowed us to make a case for getting ready and showed we understood the challenges. It also gave us valuable thought leadership material for our PR work.

**The creative concept:** We developed a fresh creative campaign that would take the stress out of auto-enrolment and draw a clear line between our approach and the sea of bland corporate financial marketing. it was vital to differentiate ourselves from competitors, who were focusing solely on selling solutions.

We worked with external agencies to create our DM pieces and build a dedicated micro-site.

Our mailings focused on taking the stress out of auto-enrolment — sending "Zen" stress balls was a fun way to illustrate that core message. Follow-up calls told us that recipients appreciated being treated as human beings.




Direct mail :phase one



Micro-site




Direct mail :phase two

> Our approach to PR was driven – we were all over the topic.

**Direct mail:** Our first mailing went to 500 finance directors and HR directors at the UK's largest organisations. The next mailing was sent to the second round of firms that would have to comply with auto-enrolment. This featured an easy-to-read auto-enrolment guidance map in the style of an Ordinance Survey map.

**Micro-site:** We built a content-rich micro-site to drive traffic and provide prospects with a call to action.

**Events and seminars:** We presented a joint session with our client  at the 2012 Pensions Show. Our own seminars featured key industry experts including Pensions Minister, Steve Webb.

**PR:** Our approach to PR was driven – we were all over the topic, seeking out opportunities, issuing comments, creating angles and driving the news agenda. Lee Hollingworth, our key spokesman, became the most sought-after commentator on auto-enrolment; appearing on BBC TV and radio and in national and trade titles. As an early entrant, we shared our experiences of working with cliients and grasped every new PR opportunity as we gained more business.

**Advertising:** Our work for our big name client was at the heart of our advertising campaign and added significant weight to our message. By highlighting client testimonials, we illustrated how we could help other businesses meet their obligations.

**Telesales and prospecting:** Our creative mailings acted as ice-breakers, making it easier to open doors via traditional prospecting and telesales.




Events and seminars

Advertising



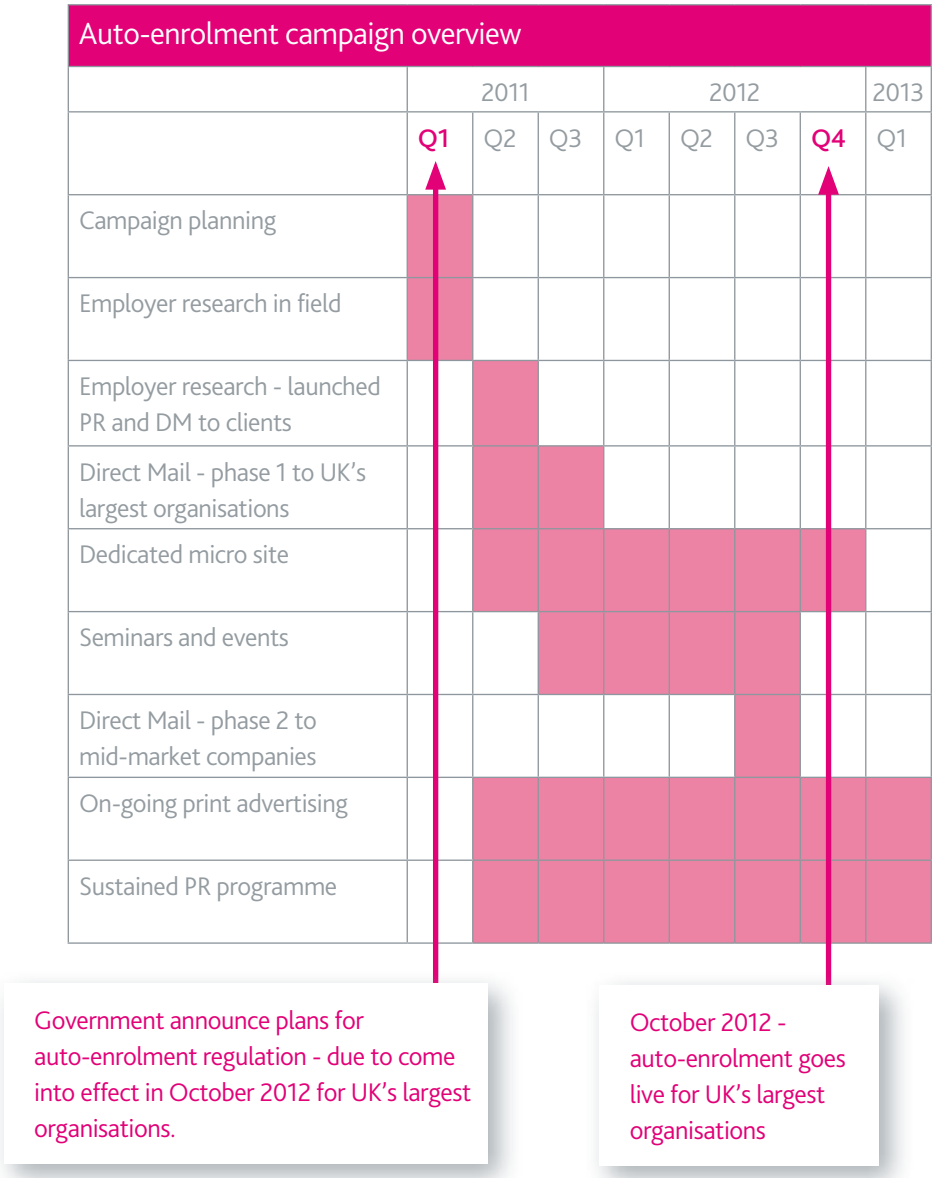



PR

# Timescales of the campaign

> “We’ve used our experience with the largest clients to build compelling solutions for the next tranche of companies that have to comply.”

The sustained campaign spanned a two-year period – from Spring 2011, when auto-enrolment was first unveiled, through to Spring 2013 — taking us past the first launch date for auto-enrolment in October 2012. As auto-enrolment has been introduced in phases, we’ve used our experience with the largest clients to build compelling solutions for the next tranche of companies that have to comply.



# Budgets

## The industry backs us




The total marketing spend was £xxxx:*

| | |
|---|---|
| Research | £xxxx |
| Phase 1 of DM campaign, micro-site development | £xxxx |
| Phase 2 of DM campaign | £xxxx |
| Events | £xxxx |
| Ad creation, media planning | £xxxx |
| PR | £xxxx |
| Telesales | £xxxx |

# Results

We made

**34**

new business wins

Our integrated campaign enabled Hymans Robertson to outperform its targets by 133% — generating an impressive £xxxx revenue against a target of £xxxx.

We made 34 big new business wins.

We have won four high-profile awards for our auto-enrolment work, including Auto-enrolment Consultant of the year at the UK Pensions Awards in 2012 and 2013.

Our PR share of voice went from 6th to 3rd position across the period.

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# Client testimonial



"Using a powerful blend of foresight, planning and creativity, our marketing team came up with a creative campaign that directly engaged prospects and enabled us to convert those opportunities into new revenue streams, way beyond our targets."

Ronnie Bowie, Senior Partner

Our PR share of voice went from

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Case studies




Thought leadership

