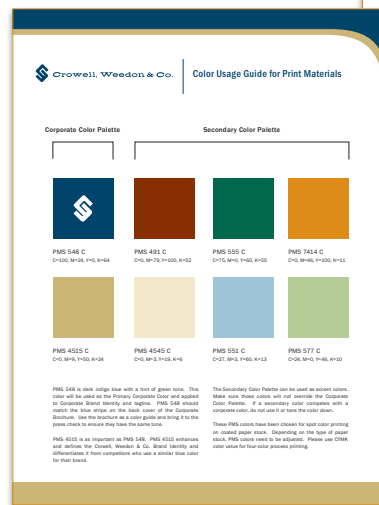
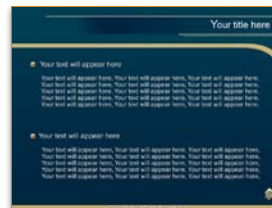


Analysis of the competitive landscape was part of our strategic process to develop brand standards and meaningful communications.



The consistent style is carried across all marketing and media from presentation templates to corporate positioning brochure.



## :: CROWELL, WEEDON & Co.

The largest independent investment firm in the west, Crowell, Weedon & Co., approached Copia Creative to develop a marketing strategy and phased implementation process with employee acceptance. The project included a strategy to define their value and execution through marketing materials and collateral. The Crowell Weedon brand has been in existence since 1932, and in order to remain current and fresh, the messaging, communication, and brand equity needed to be defined, accepted, and communicated across the entire business.

### GOALS:

- Increase company profile and the unique value Crowell Weedon offers against its competition
- Arm Crowell Weedon advisors with the proper tools to foster their abilities, growth, and efficiency
- Streamline and automate processes to increase productivity
- Ensure that all marketing and company materials are uniform and pre-compliance approved

### PROCESS AND STRATEGY:

With offices across southern California and a staff of advisors with independent sales' styles and markets, Crowell, Weedon & Co. had a goal to manage compliance without implementing too many restrictions. Copia Creative began with a review of all materials using the Crowell Weedon name including internal and executive focus group discussions. We then looked at the competitive landscape before constructing our recommendations for strategic position, tagline and descriptors, and brand strategy.

### CREATIVE SOLUTIONS:

Our analysis indicated the current name and identity, held established recognition in the market place. However, the Crowell Weedon brand attributes and unique selling position were undefined across the industry and client base.

In communicating their strategic position, Copia Creative designed a corporate piece highlighting the key values of Crowell Weedon which has played a key role in unifying the business with consistent messaging and client leave behinds.

★ 2009 Communicator Awards Gold winner

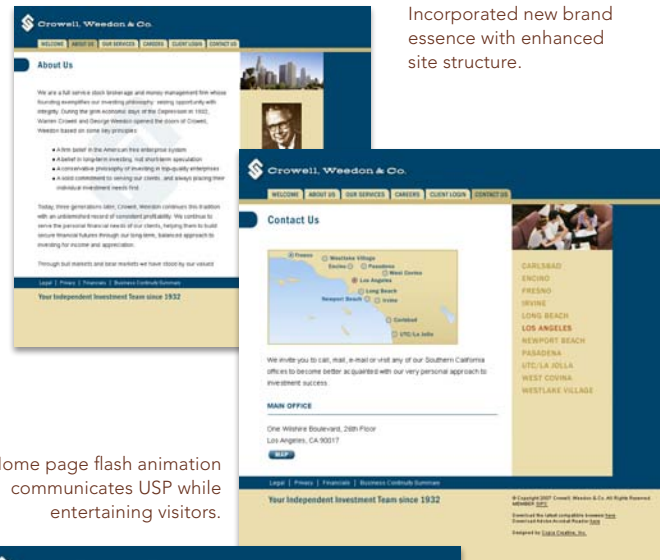
★ 2006 American Design Awards winner ★ 2005 Davey Awards winner



1: Copia Creative developed a corporate brochure complete with original tagline, "Built on integrity. Grown on Trust." Taking this theme, we developed the brochure to communicate the company's brand position, including highlighting the philosophy, history, principles, and services. Copia Creative executed the piece utilizing original copy, layout, and design to carry the theme and key messages.

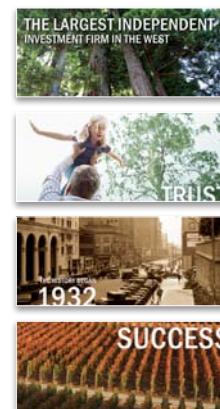
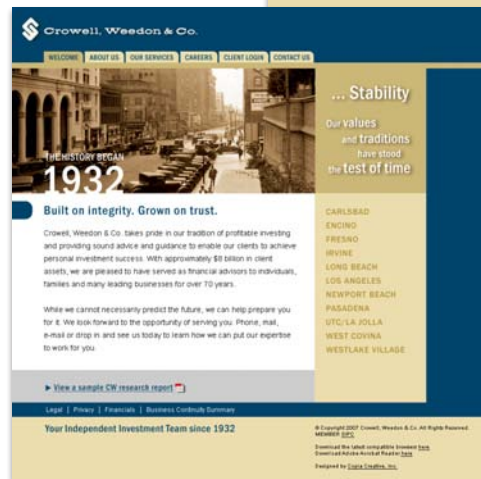


1: To reinforce the Crowell Weedon's position in the marketplace, Copia Creative developed the concept for a brochure that assists clients in understanding their changing financial needs based on personal growth. More than an informative marketing piece, this collateral serves as a tool for investors. Copia thought it only natural to connect the largest investment firm in western United States with another giant in California: the mighty sequoia.



Incorporated new brand essence with enhanced site structure.

Home page flash animation communicates USP while entertaining visitors.



★ 2009 Communicator Awards Gold winner ★ 2006 Davey Awards Gold winner



Aligning with the advisors and strategically working directly with the company's chief officer, each piece is designed to support the key defining principles the company stands for as well as continually engage the end users with advisory knowledge to reinforce their role and accountability to their clients.

Each office and advisor has been trained on the style guide uses, conditions, and value as well as has convenient accessibility to review the materials via their internal intranet and office hard copy. Clear, consistent, and customizable templates were also a result of our assessment and have become valuable communication tools aligning the company and reinforcing the Crowell Weedon brand. Our approach with Crowell Weedon is a steady roll out with consistent marketing initiatives and business support changes that continue to steward the brand and further develop its image in conjunction with field offices. Our services included:

- Consistent design with defined color palette, font treatments, use of name and tagline indicating key brand attributes and identifiable recognition
- Design original communications and collateral
- Create support materials to assist their clients
- Implement brand standards and guidelines for all advisors
- Develop a customizable template to increase visibility and maintain consistency

#### RESULTS:

The results have included a high rated user acceptance, brand refresh with measurable success, and an ongoing planned roll out of continued initiatives in marketing and advertising.

Complete alignment and strategic planning with open communication amongst Copia Creative and Crowell Weedon allows us to continue to achieve and exceed our defined measures of success and continue on a path of perpetual advancement.

**"Copia Creative really captured and put into words what my father and grandfather worked to create/achieve with Crowell Weedon."**

-Andrew Crowell