

Problem

eMoney Advisor had developed an online wealth management solution that enabled advisors to build better relationships with their high-net-worth clients. The Company knew that it needed to market the offering within the financial services industry, and already had success within the insurance market, but did not know how to prioritize the other financial market segments. The Company also needed to develop a brand architecture that reflected its service offerings.

Solution

eMoney Advisor engaged Zer0 to 5ive to conduct primary and secondary research to: better understand how the Company and its eMoney product should be positioned and marketed; gain insight into the development of the online wealth management market; and define the opportunities within the insurance, banking and corporate industries.

By interviewing executives in the banking, insurance industries and corporate industries, Zer0 to 5ive gained insight into the target audience's product and service needs, decision-making processes and key buying drivers. The primary and secondary research findings also helped eMoney Advisor prioritize its vertical expansion strategy. Although there were significant opportunities in the banking and corporate markets, there was also considerable competition from well-known and well-established players. The conclusion was to first commit resources towards securing eMoney's leadership position in the insurance market, where it had credibility and a proven track record, while working to establish relationships that would be necessary to enter the other markets. Zer0 to 5ive also identified eMoney Advisor's primary differentiator – a unique commitment and focus on enhancing the client-advisor relationship. Zer0 to 5ive used

this concept to develop the corporate tagline, "Maximizing the Advisor-Client Relationship."

To strengthen its position, eMoney Advisor needed to brand its product and service offerings. Zer0 to 5ive recommended that eMoney Advisor create a new brand architecture where individual product brands would support the overall corporate brand. The main product, the wealth management platform, became the AdvisorPlatform™, and the marketing and consulting services became AdvisorMarketing™ and AdvisorConsulting™. This distinctive combination of innovative technology with industry expertise and consulting has helped eMoney Advisor differentiate itself and define a new niche within the wealth management category – holistic wealth planning.

Benefit

After the research was completed, eMoney Advisor retained Zer0 to 5ive to serve as its interim VP of marketing, responsible for implementing the recommendations from the research and marketing plan development. Zer0 to 5ive developed the Company's first press kit, launched the new technology and services, led a full Web site redesign, created new sales collateral, managed communications outreach, including multiple bylined articles and presentations, and organized speaking engagements and event participation. Since eMoney Advisor's launch with new positioning and messaging, the Company has announced several strategic relationships and new client wins, garnered significant media coverage, gained the attention of industry analysts, created inbound sales leads and further secured eMoney's position as the leading provider of holistic wealth planning solutions that focus on maximizing the advisor-client relationship.

Boston

207 Highland Road
Andover, MA 01810
617-834-2190
Nicole Loring

New York

41 East 11th Street
11th Floor
New York, NY 10003
718-623-0355
Jennifer Moritz

Philadelphia

650 Clovelly Lane
Devon, PA 19333
610-688-0205
Santiago Pujadas
Michelle Pujadas

Pittsburgh

12 Federal Street Suite
201Pittsburgh, PA 15212
412-580-3675
Jennifer Bannan

Problem

LearnNow was an education management company dedicated to helping parents, educators and other community members from under-resourced communities establish and maintain high performing Community Academies.

The company was seeking to launch into the market of privatizing education, but faced the daunting obstacles of competition from other for-profit education firms, as well as educators who felt strongly that education should continue to be publicly managed.

LearnNow began working with Zer0 to 5ive in the Fall 1999, at a time when the company was just three executives, a business plan, and about to close on its first round of funding. Twenty-two months later, the company was acquired for approximately \$40 million.

Solution

Zer0 to 5ive took LearnNow through its research-based Roadmap, a branding process that provided LearnNow with a successful position, key messages, brand identity and image, as well as a thorough go-to-market plan.

For LearnNow the process was a revelation.

“We had gone into the process thinking we would be known as the company that builds math, science and technology focused schools,” said Gene Wade, CEO of LearnNow. “What we found out through the process was that what differentiated us from our competition was our deep community involvement in establishing schools in under-resourced communities.”

In addition to executing a successful

Roadmap and accompanying graphic identity, Zer0 to 5ive executed an integrated marketing communications campaign that guided LearnNow as it entered the marketplace.

Benefit

The Zer0 to 5ive Roadmap process and communications campaign was a great success and resulted in LearnNow obtaining its first five charter schools located in Philadelphia, Pa., Washington, D.C. and St. Paul, Minn. Further, the community-focused “hometown” team approach led to LearnNow’s acquisition by the nation’s leading private manager of public schools, Edison Schools (Nasdaq: EDSN). The integrated plan included the following initiatives:

Comprehensive Media Strategy

National, Trade and Regional Media Relations – successful story placement in the mainstream national press, including Wall Street Journal, CNNfn, FOXNews; cover stories in EducationWeek, Education Update; and stories in those regions where charter schools were being sought, including the Philadelphia Inquirer, New York Daily News, St. Paul Pioneer Press.

Cohesive Marketing Collateral

- Graphic Identity and Usage Guidelines
- Corporate Materials including a brochure and PowerPoint presentation
- Charter School Student Recruitment Brochures
- Press Kit

Grass Roots Tactics

- Community Town Meetings
- Print Advertisement

Boston

207 Highland Road
Andover, MA 01810
617-834-2190
Nicole Loring

New York

41 East 11th Street
11th Floor
New York, NY 10003
718-623-0355
Jennifer Moritz

Philadelphia

650 Clovelly Lane
Devon, PA 19333
610-688-0205
Santiago Pujadas
Michelle Pujadas

Pittsburgh

12 Federal Street Suite
201 Pittsburgh, PA 15212
412-580-3675
Jennifer Bannan