

MARSTRATS CASE STUDY

Edward Jones[®]

M
MARSTRATS
MARKETING
STRATEGY
SOLUTIONS

Challenge

Edward Jones was not meeting the Non-Licensed Investment Representative (NL IR) hiring goals; turnover with IRs was averaging 50% in the first year. Their recruitment goals were aggressive.

Their strategy for hiring NL IRs was mainly through Open Houses at existing broker offices by inviting individuals to a brief presentation on the benefits of being an IR at Edward Jones. There was no strategic rationale on where the Open Houses were located; how the advertising dollars were spent and no consideration for the cost of media in a local market. A local IR would make a request for an Open House and it was scheduled.

In addition, there was no one “employer brand” being utilized across all of the various HR departments: IR Recruiting, BOA (Brand Office Administrator at the local IR’s office) and Home Office (corporate).

While at JWT Specialized Communications, Connie Risby lead the response to the agency search conducted by Edward Jones and was awarded the contract.

Solution

PRISM Cluster Analysis

We developed strategy to recruit NL IRs, based on attitudes/values vs. demographics/career categories (sales) utilizing PRIZM clusters. We completed an analysis of high performing NL IRs across the country against PRIZM clusters and developed a national PRISM composite profile. This data included

- ▶ EM NL IRs (exceeds/meets expectations)
- ▶ Demographics
- ▶ Psychographics/life styles/attitudes
- ▶ Media habits
 - MRI/Scarborough
- ▶ Geographic targeting for NL IR recruitment
 - Key cluster counties/zip codes

We then took this composite profile and extended it to the U.S. This directed us to where the most ideal candidates for NL IRs would be located (down to zip +4); the information also detailed media usage habits, psychographics, attitudes, values and more.

Strategic Planning to Prioritize Markets

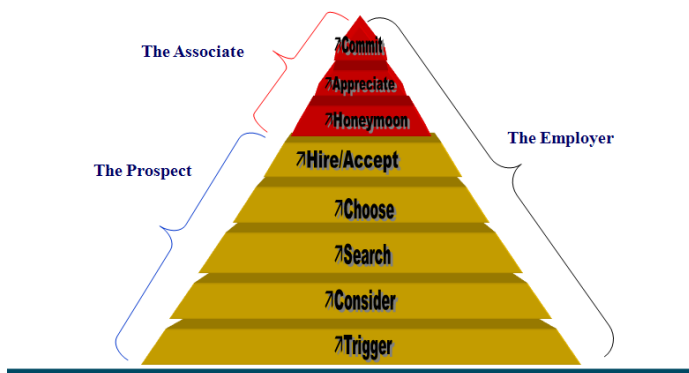
Next, in order to establish market priorities, we then did an analysis of all media markets in terms of:

- ▶ Dollars spent by market
- ▶ Media index by market (this was a customized media index developed for Edward Jones, based on their heavy use of print media)
- ▶ Number of referrals by market from NL IRs
- ▶ Open House volume by market
- ▶ The markets with the greatest recruitment goals for NL IRs.

TTEB “Thompson Total Employer Branding”

We implemented our branding process that included

- ▶ Seven (7) Focus Groups (U.S. and Canada, new and existing NL IRs, Home Office, BOAs, management, etc.)
- ▶ Deliverables for the project included a *Day One* with all of the key stake holders at Edwards Jones where the due diligence from the focus groups was presented. A key positioning statement was developed along with a Branding Post Card:



From this process a campaign was developed -- “Success Line”

Utilizing the familiar business icon – a graph with a rising arrow line – Edward Jones communicates a message of growth, advancement and positive momentum. It is a promise to the candidates that with Edward Jones’ unique business model and unmatched level of support, combined with the individual’s talent and drive, career success is all but limitless.

Print Ads



Your ambition
x Our backing
A business of your own

Help your florist bloom.

Investment Representatives

As an investment representative, you can really make money grow for your neighbours and small businesses.

Working from offices in your community, paid for by us, with your own staff and full, paid training, it's a unique opportunity to boost the local economy – and create a brighter future for yourself. If you've got a flair for sales, bags of initiative and plenty of self-motivation, we will give you all the backing you need to build your own business.

To find out more visit our career seminar hosted by investment representative Kathryn Zolkiewics at 7pm on Thursday 29th May. The venue is Edward Jones, 13 Druid Hill, Stoke Bishop, Bristol. Numbers are limited, so please reserve your place by calling 0800 358 0003. CVs can be e-mailed to uk.cv@edwardjones.com. Qualified financial advisers welcome. www.jonesopportunity.com Quote ref: MEN15/05/03.

Edward Jones
Serving Individual Investors

Edward Jones Limited. Member of the London Stock Exchange. Authorized and regulated by the Financial Services Authority. Edward Jones is an equal opportunities employer.



Your lifestyle
x local opportunities
a rewarding future

A great career is just around the corner.

If you're looking for an exciting career, it's here in your neighborhood – right now – with Edward Jones. Unlimited income potential. Exceptional training. And a family-friendly culture where you can enjoy a rewarding work/life balance. It's no wonder we're ranked No. 1 in FORTUNE® magazine's "100 Best Companies to Work For."

Attend one of our Career Seminars.

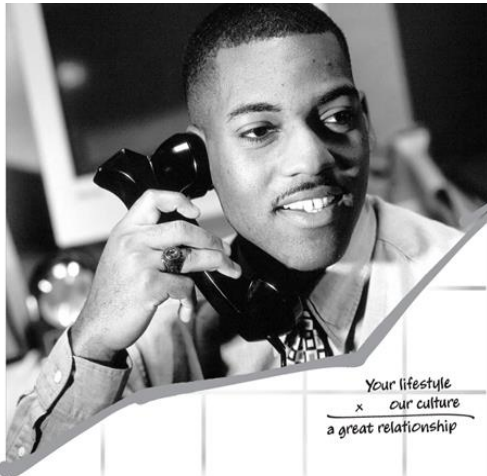
We're seeking motivated, sales-oriented individuals to become investment representatives in St. Louis and surrounding areas.

Tuesday, Nov. 6, 5-7 p.m.
Sheraton Hotel
1615 Richmond Ave.
St. Louis, MO
Host: Mark Anderson
RSVP: 604-501-2196

Monday, Nov. 12, 5-7 p.m.
Embassy Suites Hotel
7625 Washington Blvd.
St. Louis, MO
Host: Karen Ogden
RSVP: 502-555-5555

www.jonesopportunity.com Licensed professionals welcome. Call for a confidential appointment.

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Your lifestyle
x our culture
a great relationship

The perfect fit.

Edward Jones is proud to support the NAACP Freedom Fund dinner. We recognize that an inclusive environment, where diverse ideas and perspectives are encouraged and rewarded, is good for building strong community relationships – and business success.

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Move up without moving out of town.

Your desire to grow
x our local opportunities
a rewarding future

With Edward Jones, you'll find a rewarding career right here in _____. No cap on earnings. No proprietary products to sell. And the support of an industry leader. It's no wonder we're ranked No. 1 in FORTUNE® magazine's 2002 and 2003 list of the "100 Best Companies to Work For."

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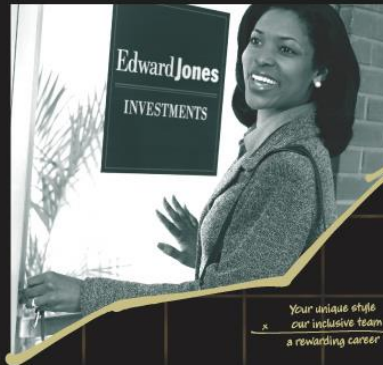
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Your unique style
x our inclusive team
a rewarding career

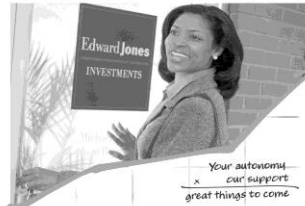
Declare your independence.

If you're ready to determine your own success, you're ready for Edward Jones. For more than 150 years, our proven business model has been helping individual investors achieve their long-term financial goals. As an investment representative, you'll run your own office in your own community while we provide you with exceptional training, resources and sales support. And with no cap placed on your earnings, it's your hard work and drive that determine your income.

You'll also find an inclusive environment where diverse ideas and perspectives are encouraged and rewarded. So long as your entrepreneurial spirit is Edward Jones. That's why we were ranked No. 1 in FORTUNE® magazine's 2002 list of the "100 Best Companies to Work For."

Local investment representative opportunities are available nationwide for sales-oriented individuals. For immediate consideration, call 1-800-999-5650 or apply online at www.jonesopportunity.com.

Additionally, we have opportunities in our St. Louis, Mo. headquarters and Tampa, Fla. campus supporting our St. Louis office.



Your autonomy
x our support
great things to come

Answer to the best boss you've ever had. You.

Ready to be in business for yourself, but not by yourself? At Edward Jones, we'll give you all the support you need to succeed. No upfront costs to start. Paid training program. Unlimited earnings potential. Outstanding support. Competitive benefits. And your own office and assistant – both company paid.

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Banner Ads



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COMPANIES
TO WORK FOR 2002** Want to be in business for yourself,
not by yourself?

**FORTUNE®
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COMPANIES
TO WORK FOR 2002** Are you entrepreneurial, sales-oriented
and looking to be your own boss?

**FORTUNE®
100 BEST
COMPANIES
TO WORK FOR 2002** Do you want professional success *and*
time for your family?

Answer to the most
important person
you know. Yourself.

And the next one could be yours.

With 10,000 Edward Jones offices due to be open by 2004, our continued growth means outstanding career opportunities for you. Ready to build your own business and run your own office? At Edward Jones, we'll give you everything you need to get started today – and the potential for growth tomorrow.

No upfront costs to start. Paid training program. Unlimited earnings potential. Outstanding marketing, research and technical support. Competitive benefits. Your own office in your neighborhood and an office assistant – both paid for by Edward Jones. The reasons for joining Edward Jones as an investment representative just keep adding up. Contact us and see why we ranked No. 1 in FORTUNE® magazine's 2002 and 2003 list of the "100 Best Companies to Work For."

IR Recruiting
1245 J.J. Kelley Memorial Dr.
St. Louis, MO 63131

Take the next step and send your application today or call **1-800-999-5650** for more details. Please reference code **ICA** when you respond.
www.jonesopportunity.com

Over 8,800
offices.

And the next one could be yours.

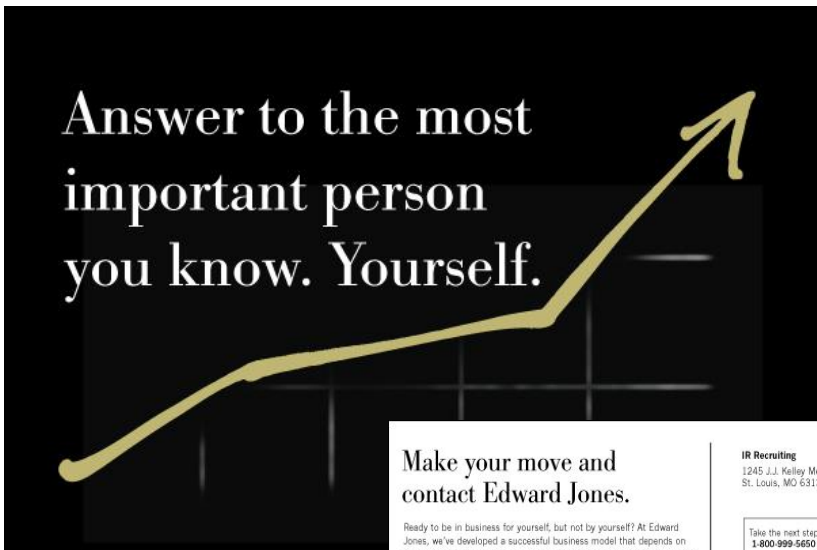
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Direct Mail



Answer to the most important person you know. Yourself.

Make your move and contact Edward Jones.

Ready to be in business for yourself, but not by yourself? At Edward Jones, we've developed a successful business model that depends on the sales skills and entrepreneurial spirit of each one of our investment representatives. You'll run your own office and make your own decisions. In turn, we'll give you all the support you need to succeed.

No upfront costs to start. Paid training program. Unlimited earnings potential. Outstanding marketing, research and technical support. Competitive benefits. And an office assistant paid for by Edward Jones. The reasons for joining Edward Jones just keep adding up. Contact us and see why we ranked No. 1 in FORTUNE® magazine's 2002 and 2003 list of the "100 Best Companies to Work For."

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Take the next step and send your application today or call **1-800-999-5650** for more details. Please reference code IC2 when you respond.
www.jonesopportunity.com

OPPORTUNITY
NO BEST
PRACTICES

07/03

Result

- ▶ More efficient use of limited budget - based upon priorities
- ▶ More effective media placement
- ▶ Strategic annual market plans
- ▶ Integrated creative for all HR Departments -- across all media
 - Print
 - Collateral (internal/external)
 - Web site
 - Out of home
 - Internet banners