

**Envestnet: What's the first step in bringing your brand back to the forefront? Hiring a partner who can define what you stand for and help you tell your story with consistency and confidence.**

**Challenge**

Envestnet was at an identity crossroads. After existing as a technology provider for many years and then later connecting with PMC, an investment firm, Envestnet had grown to be quite successful with strong market traction, but also faced an increasing level of confusion about who they were and what they did. So Envestnet turned to s2 to help them define who they are, position them within the appropriate industry space, and create a memorable identity that focused on their key attributes.

**s2 Response**

Our comprehensive solution started with interviews of internal personnel and external advisors who used their products and services. These helped us identify Envestnet's advantages and isolate the primary reasons advisors use their platform. We then conducted a competitive analysis to better understand their similarities and points of difference.

Both of these initiatives provided the background for a revamping of the brand marketing structure and brand hierarchy, a targeted positioning platform, a tagline that resonated with target audiences, and key selling messages. Our visual identity solution provided an instant connection with their advisor audiences through the use of dynamic imagery, layout, colors, and logo revisions.

One of the first improvements we recommended was the clarification of the brand relationship between Envestnet and their affiliated investment consultancy, Portfolio Management Consultants (PMC). Clearly defining the brand hierarchy simplified the task of communicating each firm's contributions within the brand umbrella.

We then developed a suite of communications—a press release, e-mail blasts, advertising, and a new website ([www.envestnetadvisor.com](http://www.envestnetadvisor.com))—that clearly positioned how they help advisors serve clients and build their businesses. We also created a supporting process and strategic partner pieces.

**Results**

Executive management was thrilled with the power of the overall direction, the clear and differentiating brand positioning, and the integrated cohesiveness of all the underlying tactics. Feedback from both the sales force and advisors using the new website was positive, and in the six months since its official launch, it had over 140,000 hits. Through the use of topical, thematic communications and promotions, the hit results continue to steadily increase.





advisor website



postcard



advisor ad



overview brochure



capability sheets